UNIVERSITY OF ZIMBABWE

DEPARTMENT OF COMPUTING SCIENCE

INFOQUEST USER MANUAL

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Chapter 1: Getting Started

What the CD Includes

The installation CD includes the following

1. An installation program for the infoQuest Core Clients. The installer includes un-installation support.
2. System Source Code (Visual Basic 6.0)
3. The System Development Manual in the Microsoft Word 2000 and Adobe PDF formats. For printing, the PDF version is recommended.
4. The User Manual in the Microsoft Word 2000 and Adobe PDF formats. For printing, the PDF version is recommended.
5. Original structure charts and form layouts in Microsoft PowerPoint format.
6. Windows 2000 Service Pack 3.
7. Adobe Acrobat Reader 5.0
8. Microsoft Word Viewer for Word 97/2000
9. PowerPoint Viewer for PowerPoint 2000
10. Installation files for the MySQL remote database system.

System Requirements

The following configuration is based on environments used during development. As such, they should be treated as mere recommendations as opposed to instructions. Where a specific brand of software is recommended, the recommendation should not be assumed to be the assumption of any liability, by the author that may arise from the use of the software.

InfoQuest Core Clients

The infoQuest core clients comprise DSN System configuration, Administrative Console, Student Records Management, Academic Registry Management, Advanced Search and the Mail Merge utility. The following is the recommended configuration

1. An IBM compatible Personal Computer running Microsoft Windows 95, 98, 2000 (SP3), ME, or XP
2. A printer capable of printing onto A4 paper.
3. CDROM Drive for facilitating installations.
4. Microsoft Word 2000. Please not that if you do not have Microsoft Word, you will not be able to spell-check your Mail Merge documents. All other mail merge functions will however be available.
5. Microsoft Excel 95. Please not that without Microsoft Excel, you will not be able to export advanced search results into the Excel format. You will however be able to export the other reports generated by infoQuest core clients.

Database Server

The infoQuest clients are able to connect to any database system for which an ODBC or OLEDB driver exists. This includes popular remote database systems such as MySQL, Microsoft SQL Server and Oracle. The system is also compatible with desktop database systems such as Microsoft Access but their use is not recommended, as they are not suitable for multi-user environments.

Given the freedom that infoQuest gives you in choosing your database system, you should carefully consider your alternatives before committing to any database system. In particular, you should consider the experience of your IT personnel, the financial resources you will be in a position to commit towards licensing fees and the system requirements of the database system. It is also important to consider the level of technical support that will be available for each database system under the licensing agreement that you will subscribe to.

Installing The System

In the following section, it is assumed that your CD-ROM is on drive D. If this is not the case then substitute you CD-ROM drive letter in the appropriate places. Please note that if you are installing on a Windows 2000 machine, you must first install Windows 2000 Service Pack 3. The installation file for WSP3 is included on the CD-ROM under D:\W2KSP3. You should also ensure that the database system has been properly configured.

	Do not install the service pack unless you are **absolutely** sure that your machine does not already have WSP3 or any other later version of the Windows Service Pack. In addition, the Service Pack is meant for **Windows 2000 only**. Installing it on any other operating system will cause unpredictable results with the worst-case scenario being the total loss of **ALL** the data on your computer.

Installing the infoQuest Core Clients

a. Close any applications that you maybe running
b. Insert the CD into your CD-ROM drive
c. Copy the folder **D:\Core Installation** to your hard disk.
d. Navigate to the folder that you will have copied the files to and run Setup.exe
e. Follow the onscreen instructions.

	Please note that attempting to install the program from read only media such as CD-ROMs may cause the system to crash.

Configuring The DSN

Before you can use the clients, you must configure a Data Source Name (DSN) that infoQuest will use to connect to your database system. To do this

a. Install the database system's ODBC or OLEDB driver on the machine on which you want to install the client(s).
b. Refer to your Operating System's documentation for information on setting up a Data Source Name.
c. After setting up the DSN, start the infoQuest DSN Configuration Wizard. The wizard is automatically installed when you install any of the Core Clients. To start it, select it from the Windows Start Menu under Programs in the infoQuest tab. You will be presented with the following screen.

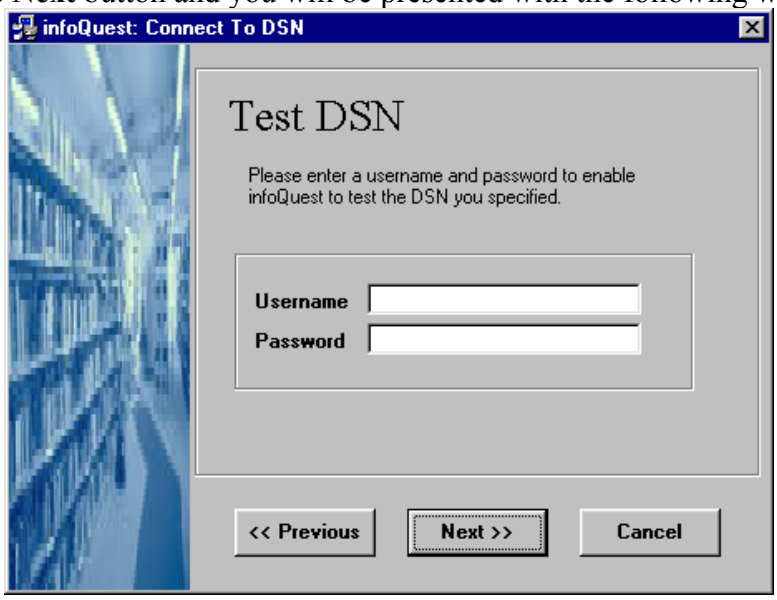
infoQuest: Connect To DSN
Welcome
Welcome to the infoQuest Data Source Name (DSN) Connection Wizard. The DSN Wizard will guide you in setting up a connection between your DSN and infoQuest.
Please choose Next to continue.
<< Previous
Next >>
Cancel

d. Choose the **Next** button. You will then be presented with the following screen.

infoQuest: Connect To DSN
Specify DSN
Click on the 'DSN' button to display your operating system's DSN configuration window. Please note that in your DSN specification, you should not specify a username or password.
DSN
<< Previous
Next >>
Cancel

e. Choose the **DSN** button. This will open your operating system's DSN selection window. For instructions on selecting the DSN, click the window's **Help** button. If you select a DSN successfully, its details will be copied onto the white area just above the **DSN** button. You should not specify a username or password at this stage.

f. Choose the **Next** button and you will be presented with the following window



g. Enter the username and password that you will have been given by your Database Administrator. If infoQuest fails to connect to the data source, you will be prompted to resolve any of the problems that the system will be experiencing. If infoQuest successfully tests the connection, you will be presented with the following window

infoQuest: Connect To DSN
Congratulations
Congratulations. You have successfully completed setting up your Data Source Name for infoQuest. Click on 'Finish' to end the Wizard.
<< Previous
Finish
Cancel

h. Choose **Finish** to end the Wizard.

	Where a database system provides you with a choice between an ODBC and an OLEDB connector, you are likely to experience better system performance if you use the OLEDB connector.

Logging Into The System

To ensure that only those who are authorised to use the system are the ones who gain access to it, infoQuest requires all users to log on and be authenticated by the database system. When you start any of the system components, you will be presented with the following screen

To log on,

1. Enter your username.
2. Enter your password.
3. Click on the **Log In** button.

	InfoQuest relies on your database system to authenticate users. As such, you should ensure that the database is configured to provide the level of security that you require. In particular, you should ensure that it does not allow anonymous logins.

InfoQuest Core Clients

Components	Remarks
Administrative Console	• Used to configure the system. • Can only be used by the administrator. • Explained in Chapter 2.
Academic Registry	• Used to administer the academic registry. • Explained in Chapter 3
Student Records Administration	• Used to administer student records. • Explained in Chapter 4
Advanced Search	• Used to execute SQL • Explained in Chapter 5
Mail Merge	• Used for automatic mailings • Explained in Chapter 6

Getting Assistance While You Work

All the windows that you are presented with within the system have online help support. You can get a quick summary of how to use the window by either

- Clicking on the **Help button**.
- Choosing **Help** from the **menu** if the window has one
- Or pressing the **F1** key.

In addition, most buttons and input boxes will give you a quick summary of what they do if you place the mouse over them for a few seconds.

Although the online system is handy, it is advisable that you skim through the entire user manual (Available on the CD) before trying anything out. You are also free to print out the manual.

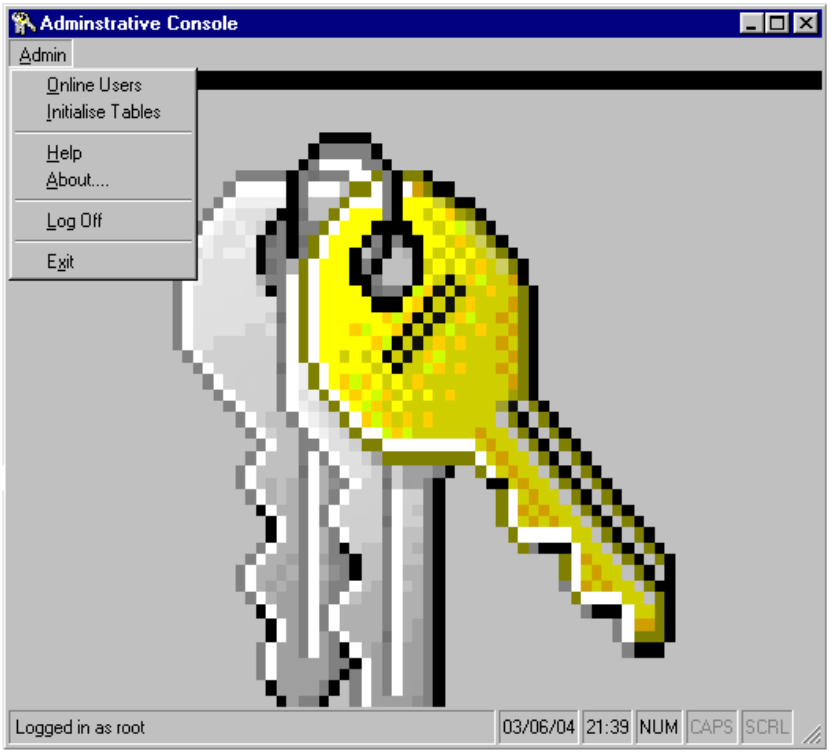
If you are stuck or discover a bug within the system, you may be able to get assistance by contacting the system developer at tgmotsi@yahoo.com. You may also want to have a look at the infoQuest website at www.geocities.com/tgmotsi which will contain updates for the system.

Chapter 2: The Administrative Console

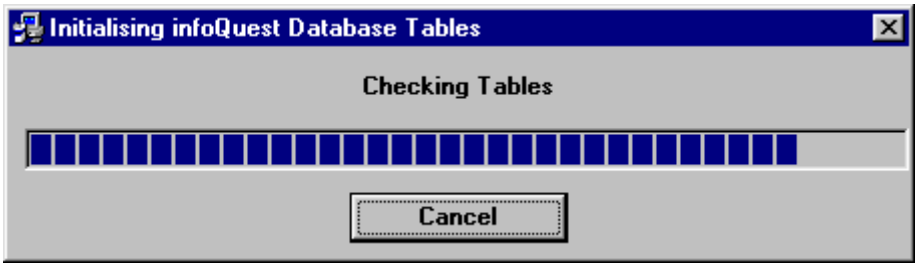
The Administrative Console provides you with tools for setting up the database tables that infoQuest uses and configuring user accounts for online access. Please note that the user accounts configured here are not the same as the one you will have to setup for each user who will be using the Core Clients. The console is available from the infoQuest program group.

Creating System Tables

a. Select **Initialise Table** from the **Admin** menu



b. The Table Initialisation will start and you will be presented with the following window. Please note that if your database already contains infoQuest tables, the initialisation will fail.



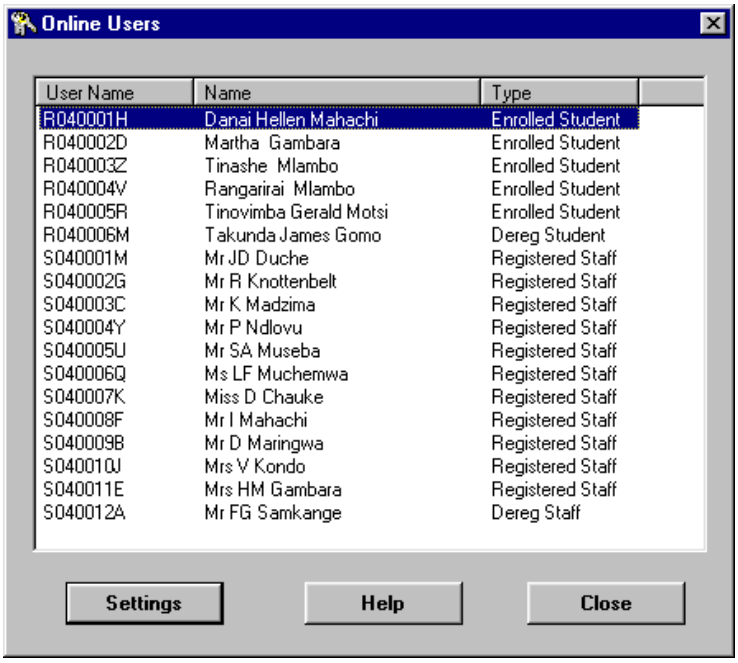
c. If the table initialisation is successful, you will be presented with a message to that effect.

Managing Online Users

Online user accounts are used for logging onto web based clients llike the Nominal Roll. In general, all system users should have an online user account. Those who use the Core Clients should in addition to the online account, have a database account preferable with a different password.

Adding New Users

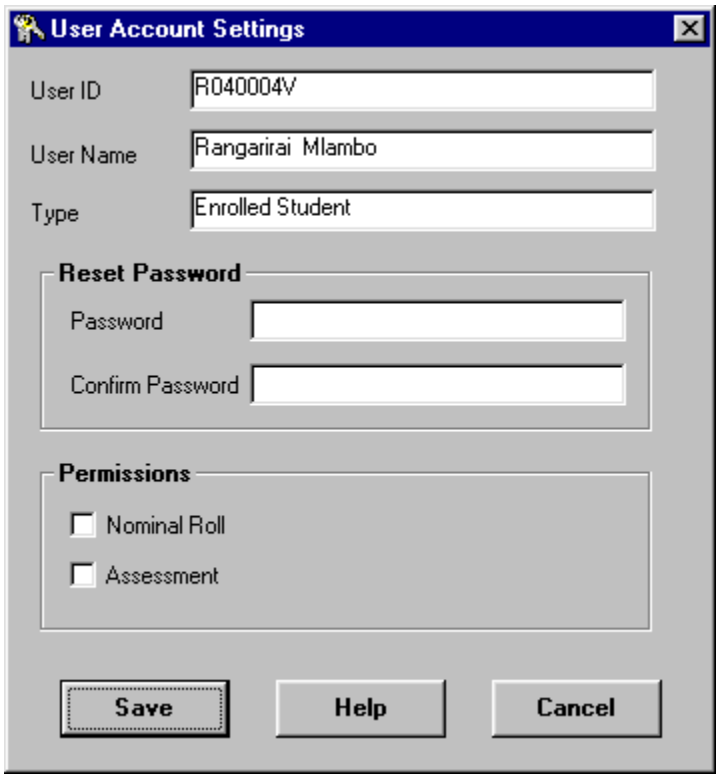
The process of adding new users is carried out by infoQuest on your behalf when you start the Online User Administration service.



InfoQuest scans the database for registered students, deregistered students, registered members of staff and deregistered members of staff who will not have online accounts and then adds them. In the process, it assigns a random password to each user which should be reset as outlined below before the user can begin using the system.

Configuring User Accounts

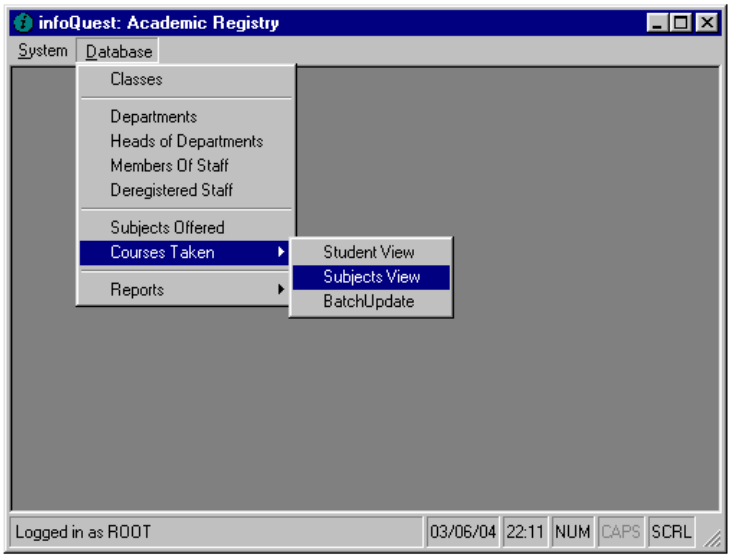
a. Select the **Settings** button. You will be presented with the following window



b. To reset the user's password, enter the new password in the **Password** field and re-enter it in the **Confirm Password** field.
c. To allow the user to access the Nominal Roll web service, click the **Nominal Roll** box
d. To allow the user to access student's past assessment records, click the **Assessment** box.
e. Choose **Save**

Chapter 3: The Academic Registry

The Academic Registry comprises Departments, Members of staff, Classes and Subjects. Because you cannot register students until you have registered some classes, you should start by entering all of the Academic Registry information with the exception of the Subjects information which should be entered after you have registered some students.



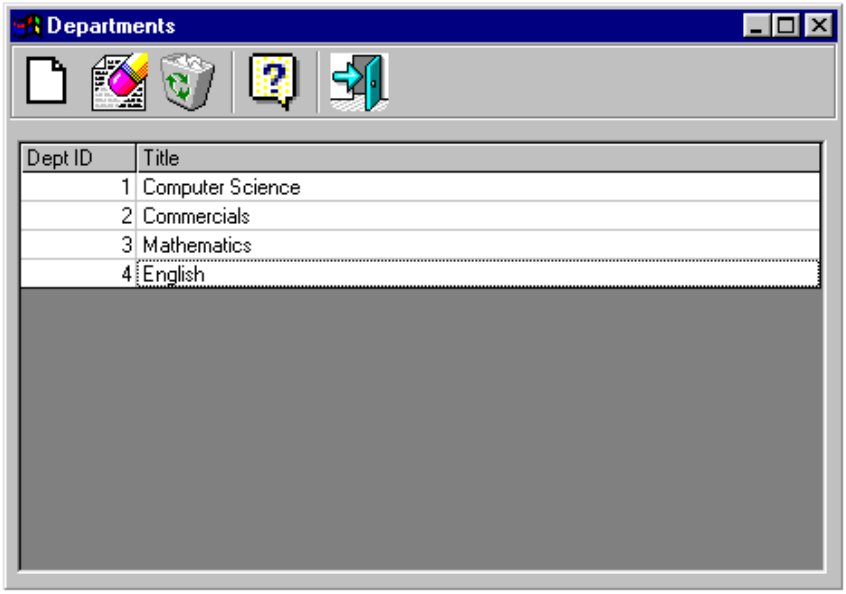
A Guide to infoQuest Icons

In this and the next chapter, reference will be made to the following standard infoQuest icons.

Icon	Description
	Create a new record
	Edit the currently displayed record
	Delete the displayed record. For students and member of staff, the icon is for deregistration.
	Reregister a deregistered member of staff or student.
	Find a record
	Obtain a system wide report.
	Display online help for the task you are carrying out.
	Close the window.

Departments

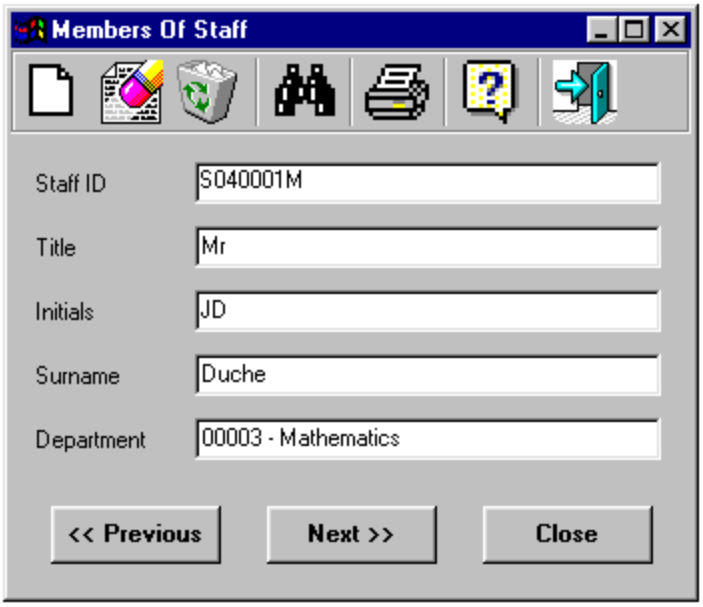
To access the Departments' window, choose **Departments** from the **Database** menu shown above. You will be presented with the following Window



1. To add a new department
   a. Choose the **New** icon
   b. You will be prompted to enter the name of the department. If the name is not unique, it will be rejected.
   c. If the addition is successful, the new department's name will appear in the list of departments.
2. To edit a department's name
   a. Choose the **Edit** icon
   b. You will be prompted to enter the new name for the department. If the name is not unique, it will be rejected.
   c. If the edit is successful, the department's new name will appear in the list of departments.
3. To delete a department
   a. Select the **Delete** icon
   b. You will be prompted to confirm the deletion. Please note that if there are any members of staff who will be registered as being members of that departments of if there any subjects that will still be registered under the department, the deletion will be rejected.
   c. If the deletion is successful, the updated list of departments will not contain the department.

Members of Staff

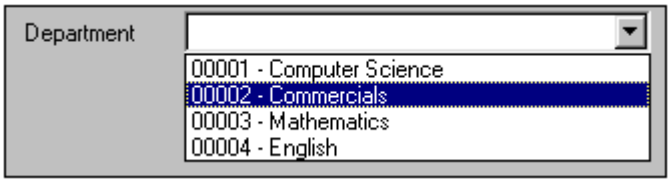
For employees at the school to have online user accounts, they must be registered as members of staff. You should therefore register all members of staff who may need to use the system even if they are not teachers. To access the Members of Staff window, choose M**embers of Staff** from the Academic Registry's Database menu.



1. To browse through the records you can use the **Previous**, **Next** and the **Search** button. The search button allows you to jump to the record of any member of staff if you know his/her Staff ID.
2. To register a new member of staff
    a. Choose the **New** icon

b. You will be presented with a form that will be blank with the exception of the **Staff ID**. Enter the title, initials and surname of the member of staff in the spaces provided.

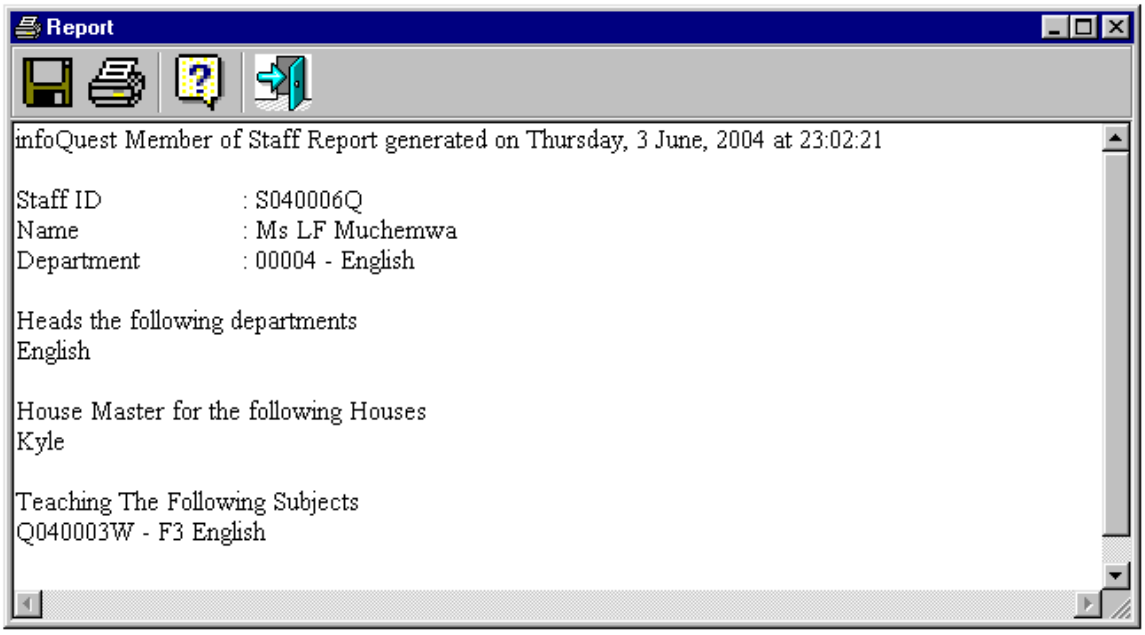
c. Select the member of staff from the list provided



d. Choose the **Save** button

3. To change a member of staff's details
    a. Choose the **Edit** button
    b. Change the details you want to change. Please note that you will not be able to change the Staff ID.
    c. Choose Save
4. To deregister a member of staff
    a. Choose the **Deregister** icon.
    b. You will be prompted to confirm the deregistration. Please note that the deregistration will fail if the member of staff is still being referenced in the system. You can check the references by request a system wide report as outlined below.
    c. If the deregistration is successful, you will get a message to that effect.
5. Obtaining a system wide report
    a. Choose the **Report** icon

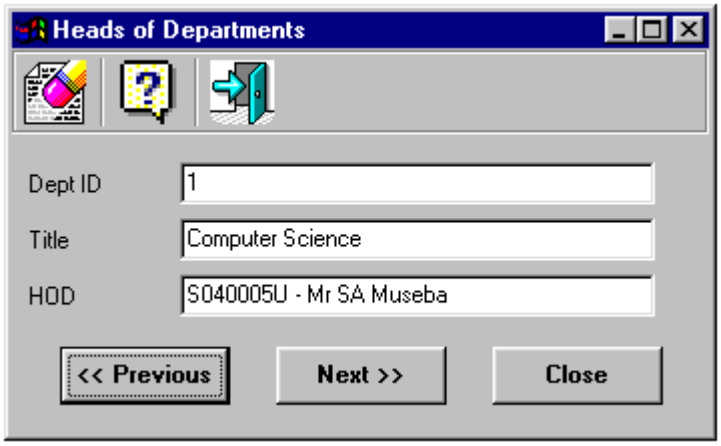
b. InfoQuest will scan the system for information about the member of staff and then provide the system to you in a comprehensive report that you will be able to save to your computer and/or print


Report
infoQuest Member of Staff Report generated on Thursday, 3 June, 2004 at 23:02:21
Staff ID : S040006Q
Name : Ms LF Muchemwa
Department : 00004 - English
Heads the following departments
English
House Master for the following Houses
Kyle
Teaching The Following Subjects
Q040003W - F3 English

c. Icons for saving and printing respectively

Heads of Departments

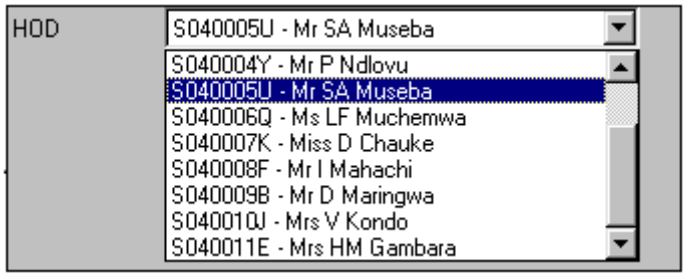
To open the HODs window, choose **Heads of Department** from the **Database** menu. You will be presented with the following window



This window enables you to specify the HODs for the departments you will have created using the **Departments** window. To specify a Head of Department

a. Locate the record of the department by browsing through the records.
b. Choose the **Edit** icon

c. Select the HOD from the list that will be provided


HOD
S040005U - Mr SA Museba
S040004Y - Mr P Ndlovu
S040005U - Mr SA Museba
S040006Q - Ms LF Muchemwa
S040007K - Miss D Chauke
S040008F - Mr I Mahachi
S040009B - Mr D Maringwa
S040010J - Mrs V Kondo
S040011E - Mrs HM Gambara

d. Choose **Save**

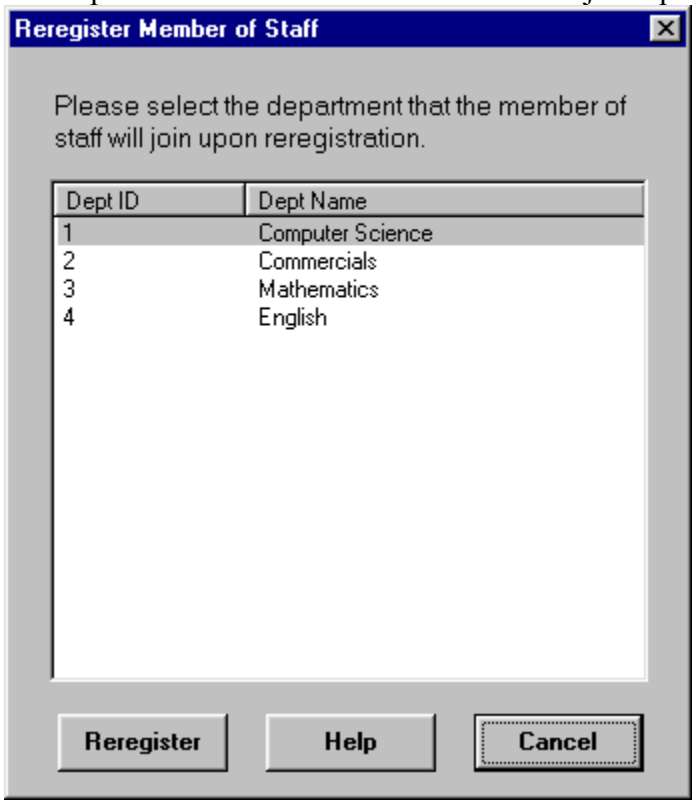
Deregistered Members of Staff

The records of deregistered members of staff are provided for reference only. You can neither delete nor edit them.

To add a new record, you must deregister an existing member of staff. In the event that you wish to reregister a member of staff whom you will have deregistered, proceed as follows

a. Select the **Reregister** icon

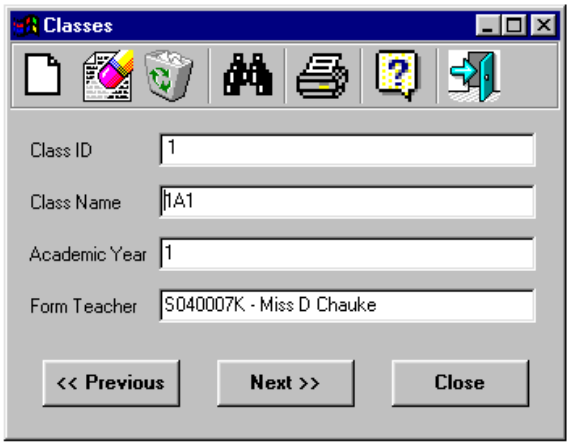
b. You will be presented with a list of departments from which you should choose the department that the member of staff will join upon re-registration.



c. Choose the **Reregister** button

Classes

1. To access the classes' window, choose **Classes** from the **Database** menu.

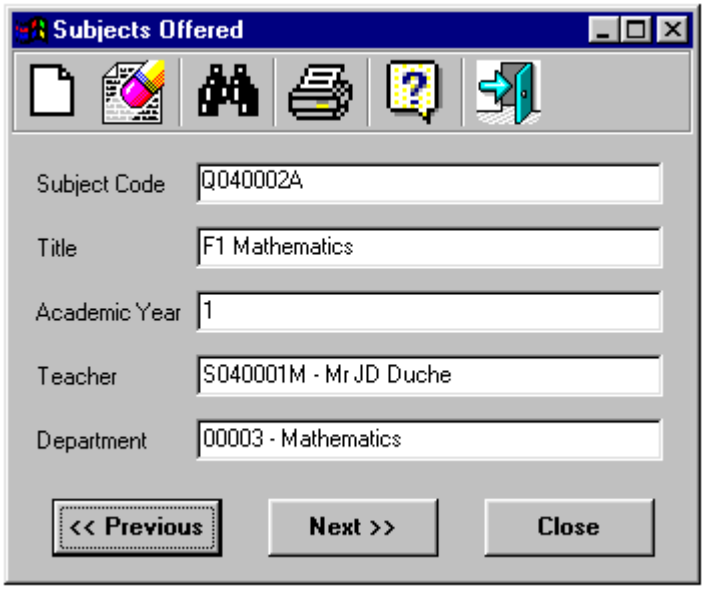


2. To add a new class
   a. Choose the **New** icon. You will obtain a form pre-filled with the Class ID
   b. Enter the class name which should be unique
   c. Enter the academic year
   d. Select the Form Teacher from the list provided
   e. Choose **Save**

3. To edit a record
    a. Choose the **Edit** icon.
    b. Change the details you want to change. Please note that you cannot change the Class ID.
    c. Choose **Save**
4. To delete a class, choose the **Delete** icon. Please note that you cannot delete a class that is in use.
5. To obtain a report detailing the students in the class, choose the **Report** icon.

Subjects Offered

The manage the list of subjects offered by the school, select **Subjects Offered** from the Database menu. You will be presented with the following window



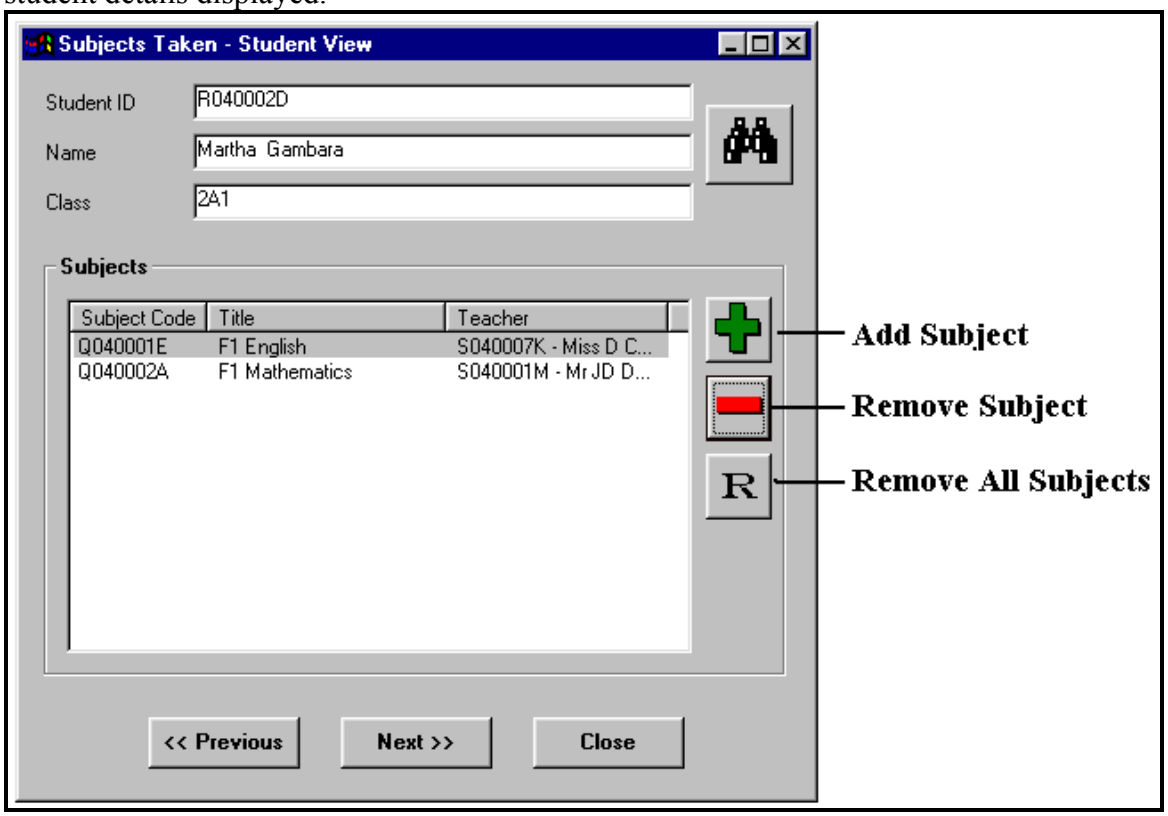
You can use the window to add new subjects and to edit the details of subjects offered. You however cannot delete a subject once you have created it.

Subjects Taken

There are three ways of managing the subjects taken namely Student View, Subject View and Batch Update. To access the services select **Subjects Taken** from the Database menu. You will be presented with a sub-menu from which you can then select the service you want.

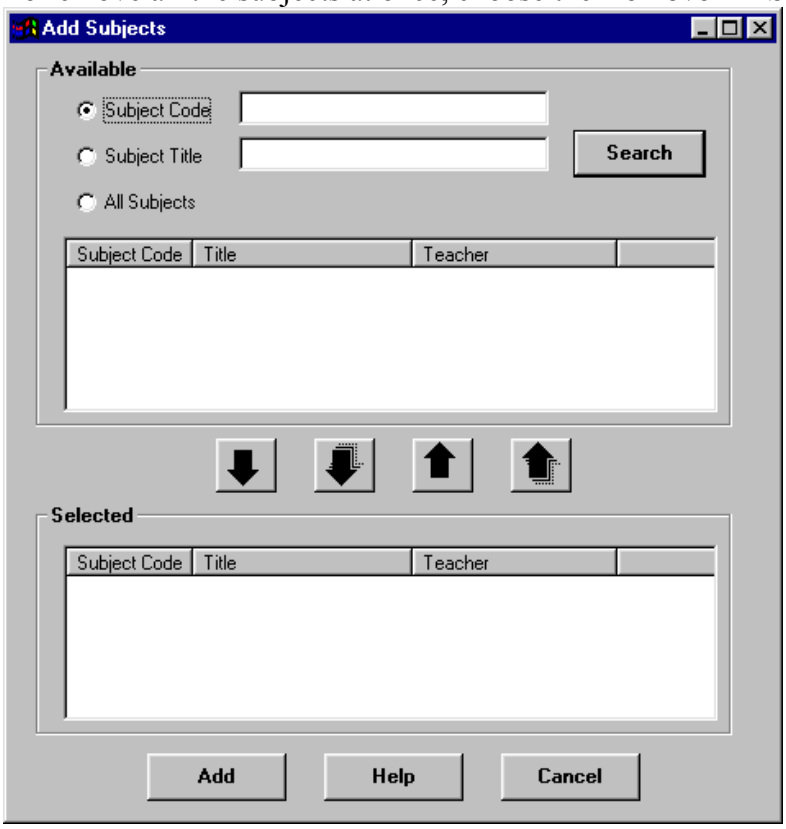
Student View

The student view shows you all the subjects for which a given student will be registered. You can add and remove subjects from this list. Please note that you cannot change the student details displayed.



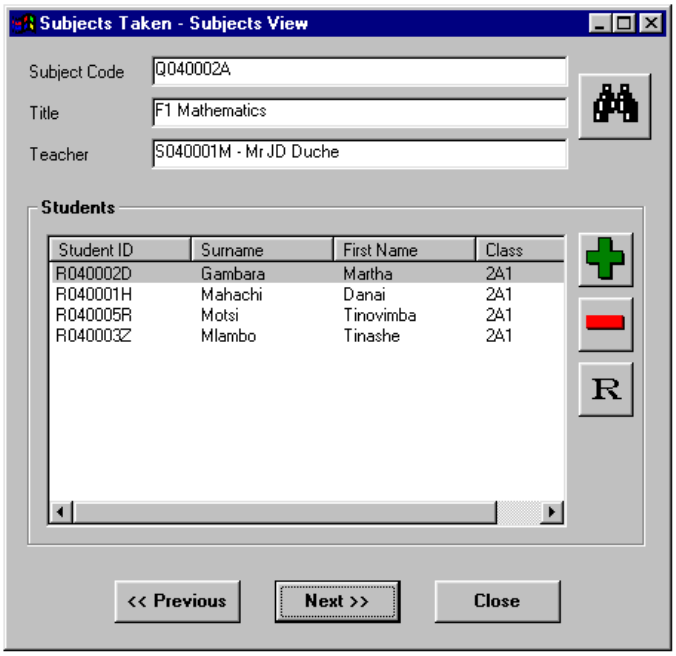
1. To add a subject to the list
    a. Select the **Add Subject** button. You will be presented with the window shown below.
    b. Specify how you would like to search from the subject from one of the following
        i. Subject code
        ii. Subject Title
        iii. All registered subjects
    c. If you are searching by subject code or title, enter the subject code or title.
    d. Select the **Search** button.
    e. The matching subjects will be listed in the **Available** box. You can move them to the **Selected** list by using the arrows. To find out what each arrow does, place your mouse over it for a few seconds.
    f. Note that you can repeat steps (b) to (e) to find other subjects which you can add to the list you will have.
    g. Whey you have finished selecting the subject you wish to add, choose the **Add** button. The subjects will be added with duplicates being rejected.
2. To remove a subject, select it and then choose the **Remove Subject** button.

3. To remove all the subjects at once, choose the **Remove All Subjects** button.



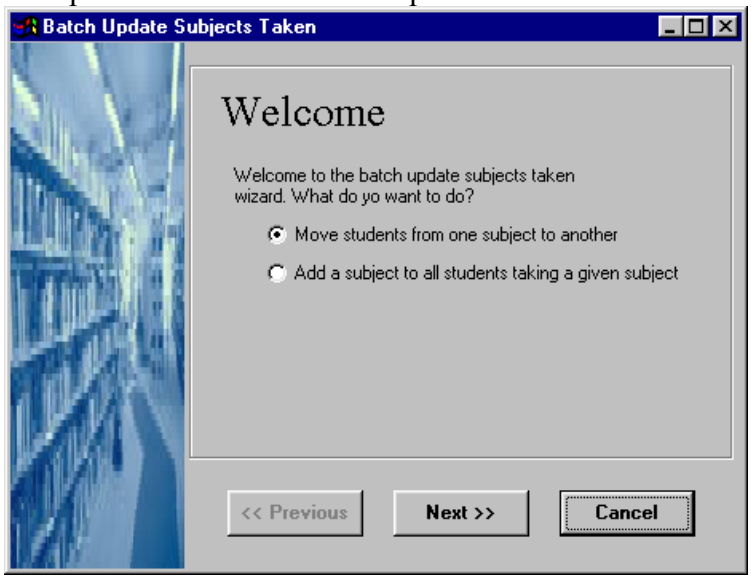
Subject View

The subject view is similar to the student view and the same techniques used in the **Student View** may be used in the subject view.

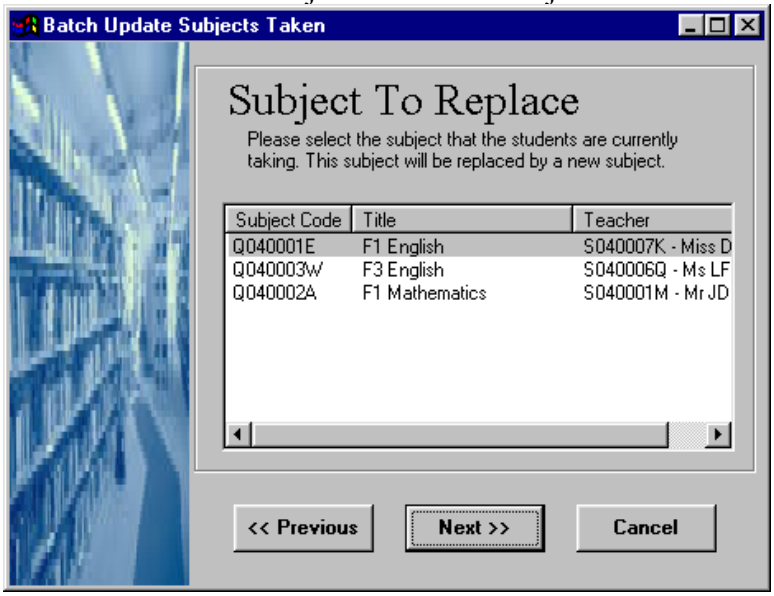


The Batch Update Wizard

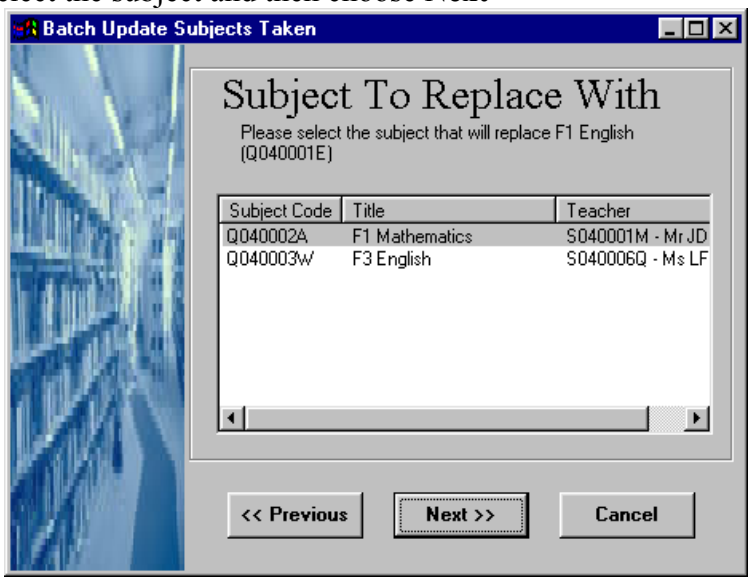
1. Start the Batch Update wizard. You will be presented with the following windows


Batch Update Subjects Taken
Welcome
Welcome to the batch update subjects taken wizard. What do yo want to do?
Move students from one subject to another
Add a subject to all students taking a given subject
<< Previous
Next >>
Cancel

2. Choose one of the options given and then choose **Next**. You will be presented with another window for specifying either the subject you want to replace or the one to which you want to add another subject. Select the subject and then choose **Next**



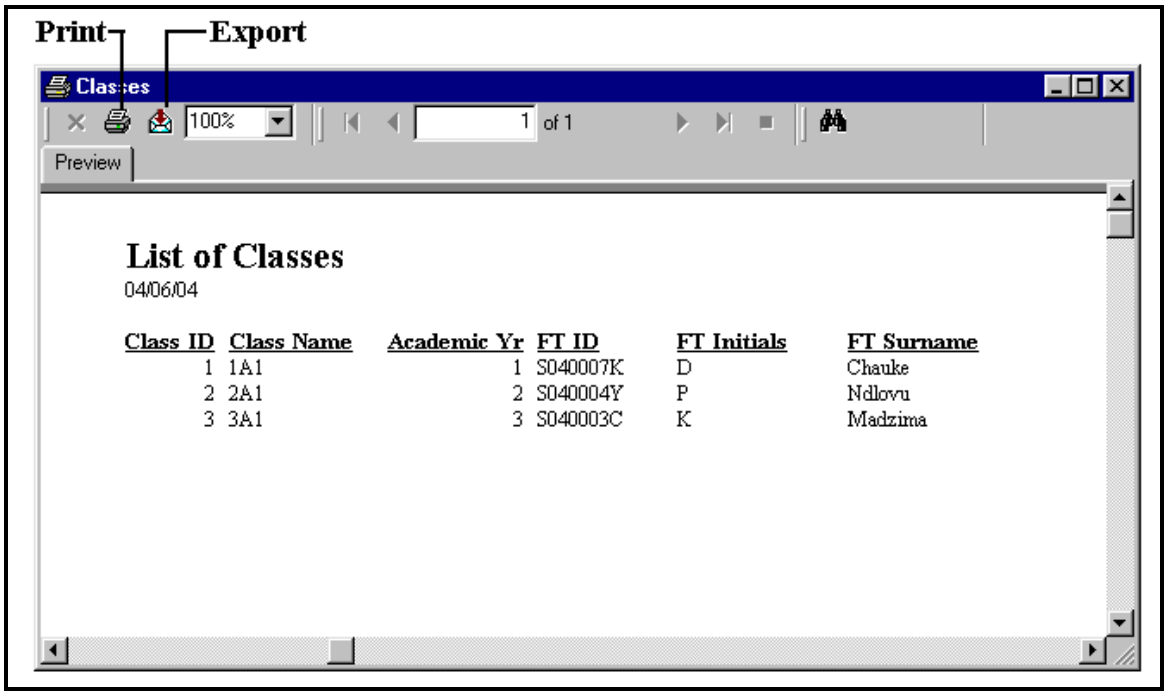
3. You will be presented with another window for specifying the subject to replace with or to add. Select the subject and then choose **Next**



4. If the replacement/addition is successful, you will be presented with a window displaying a message to that effect.

Reports

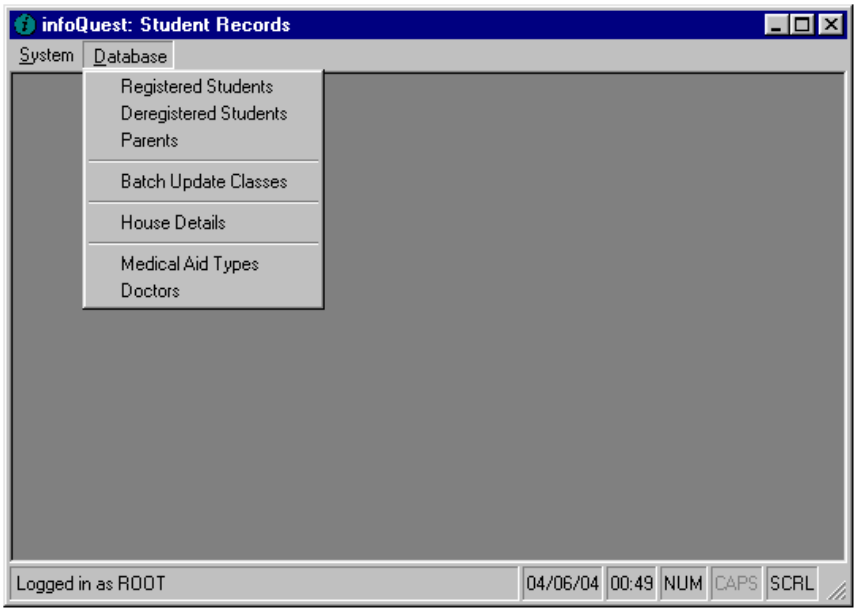
In addition to the reports that are available from the individual windows, you can also obtain other reports by choosing **Reports** from the **Database** menu of the Academic Registry. A sample reports showing a list of all the classes is show below.



The reports can be printed or exported to a variety of formats by choosing the Print or Export buttons respectively. Formats supported for exporting include Excel, HTML and PDF among others.

Chapter 4: Student Records

The Student Records client provides facilities for managing details relating to students such as Doctors, Parents, Medical Aid Details and Houses in addition to the records of the students themselves.



Doctors' Details

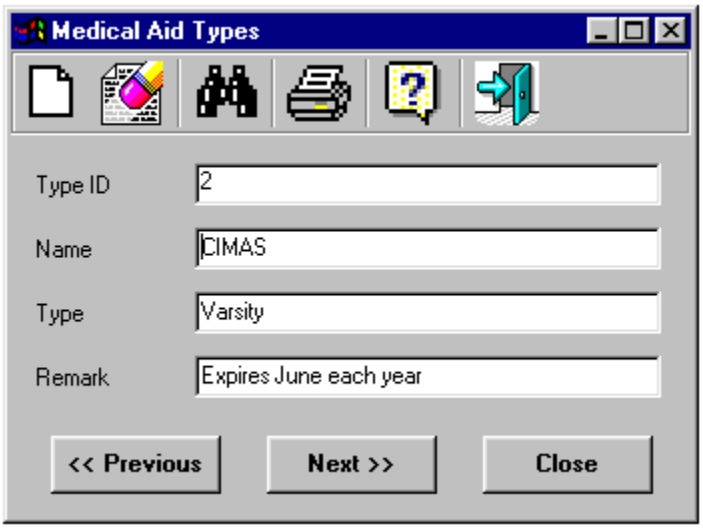
To open the Doctors' window, select Doctors from the Database menu show above. You will then be presented with the following window.

1. To browse through the records, you can use the **Previous**, **Next** and **Search**

2. To register a new doctor
    a. Select the **New** icon
    b. The Doctor ID will be pre-filled for you. Enter the other details
    c. Choose the **Save** button
3. To edit a doctor's record, choose the **Edit** button. Please note that you cannot change the Doctor ID.
4. Please note that you cannot delete Doctors' records
5. To obtain a list of the students who will be clients of the doctor, choose **Report** icon

Medical Aid Details

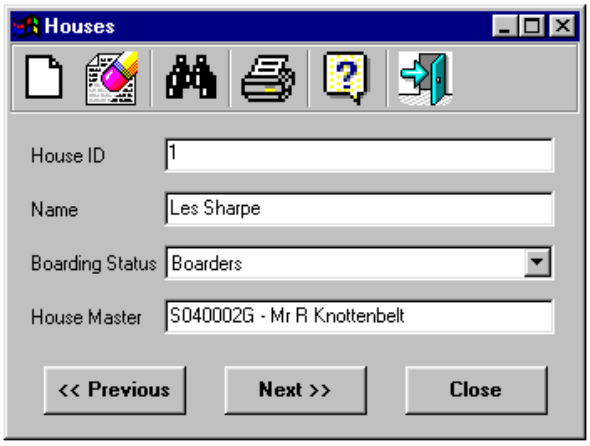
The Medical Aid window is accessible from the Database menu and looks similar to the window show below



The window behaves in a similar way to that for doctors. It should however be noted that there is a restriction on the values you may enter. The combination of the name and type must be unique. For example, given the record shown above, one could register another medical aid type with a type of **varsity** as long as its name is not **CIMAS**.

House Details

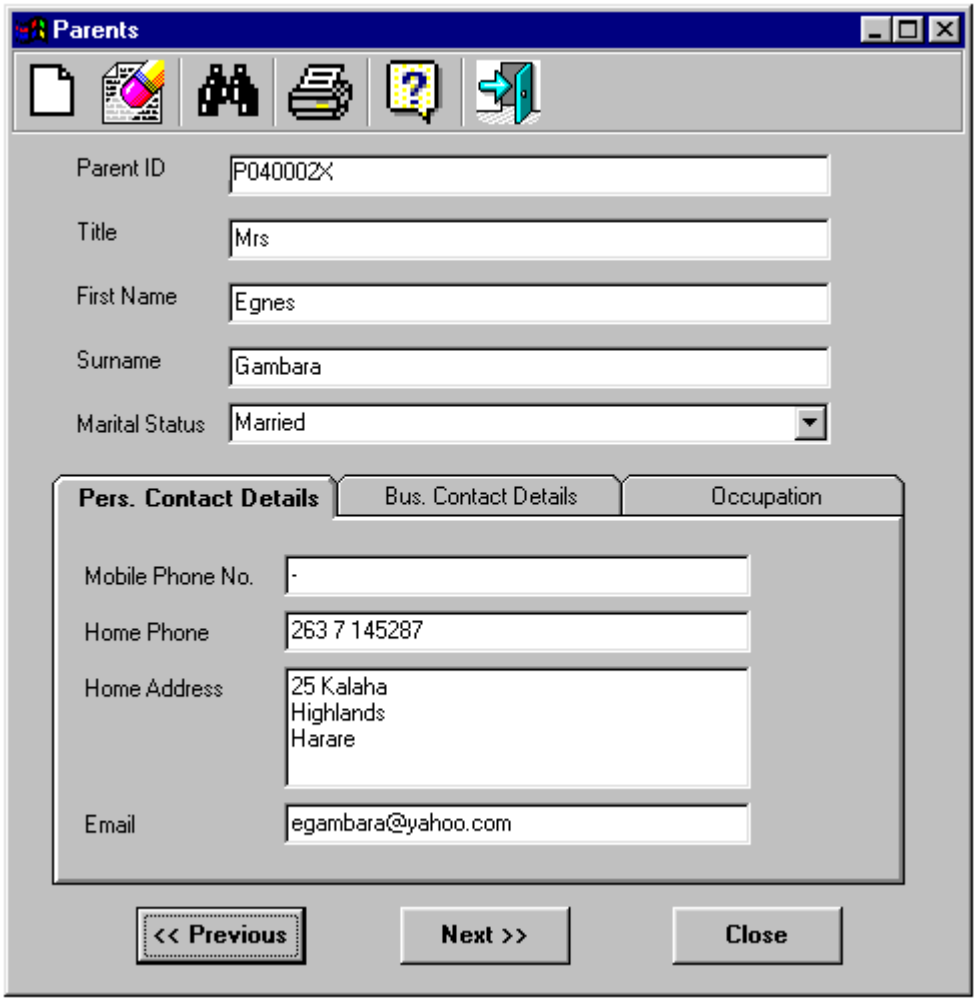
The House Details window is accessible from the Database menu and looks similar to the window shown below.



This window also behaves in way that is similar to the Doctors' window. However, when entering a new record or editing an existing one, you can only type in the House Name. For the **Boarding Status** and the **House Master**, you must select your entry from the lists that will be provided. The boarding status should be one of the following: Boarders, Day Scholars, Mixed or Weekly Boarders. The house master list will contain all the members of staff so the housemaster must be a registered member of staff.

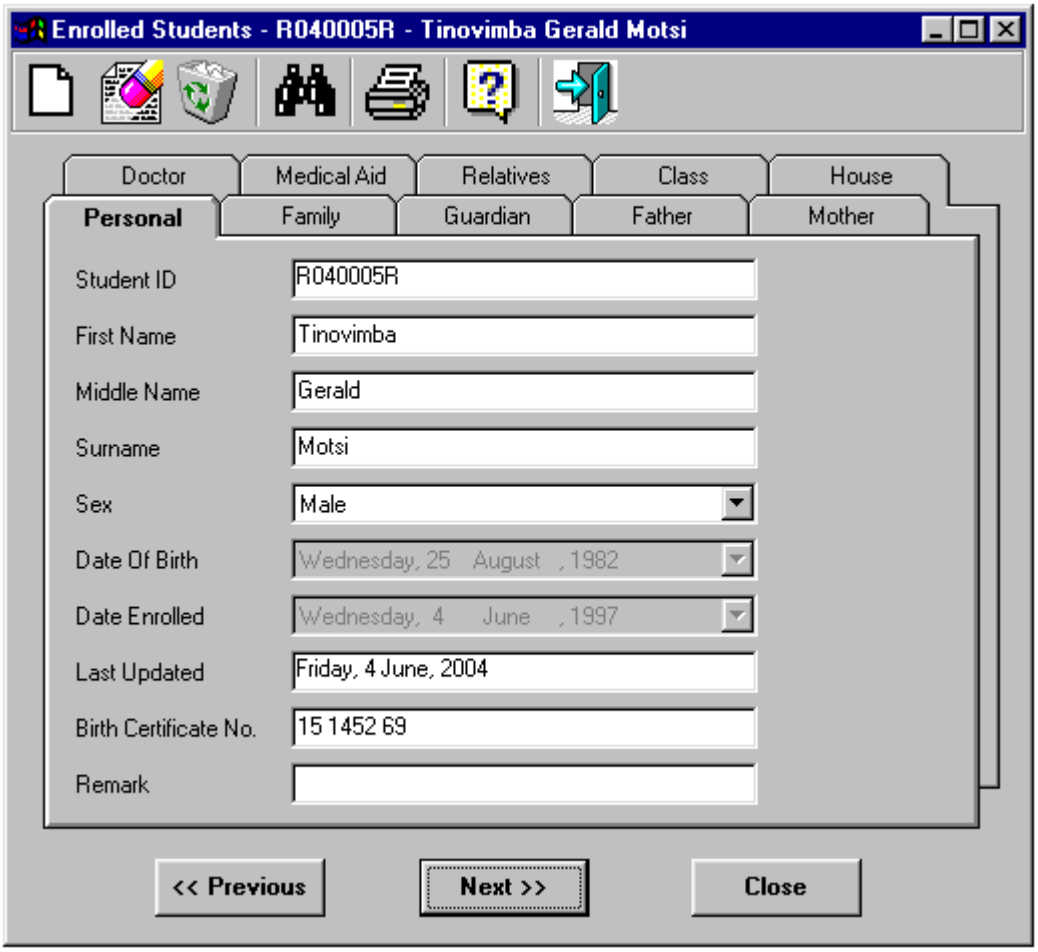
Parents

To access the Parent's window, choose **Parents** from the **Database** menu. Please note that when a member of staff is also a parent and/or a guardian, you will need to register him/her as a parent in addition to the registration as a member of staff. Also note that all the details in window will be required during editing and the making of new records. However, you can enter a '-' for all the details you will not be having. A sample Parent window is shown below.



Student Records

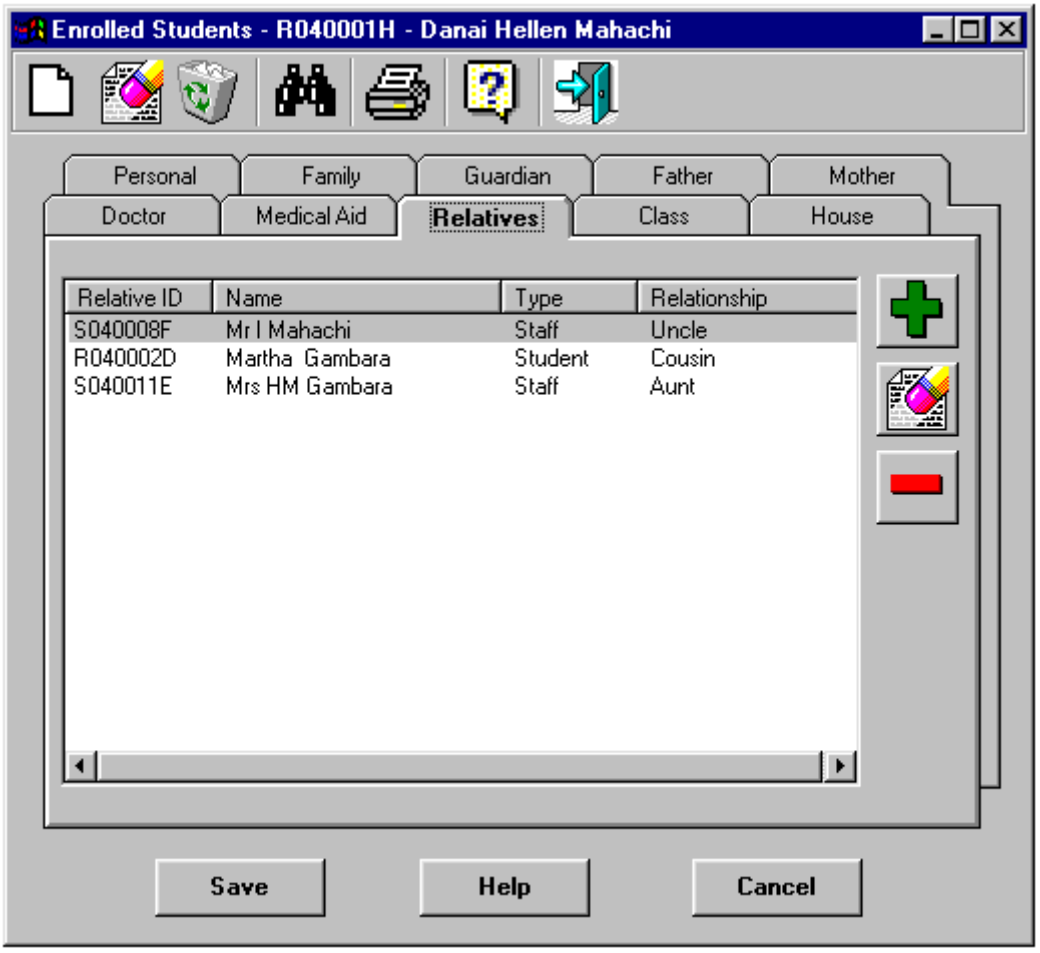
This window provides you with a facility for recording student details. Please note however that it does not allow you to add or change the details of parents, doctors, medical aid types or houses. You must therefore register all these details before you attempt to register a student who requires them. A screen shot of the window is show below.



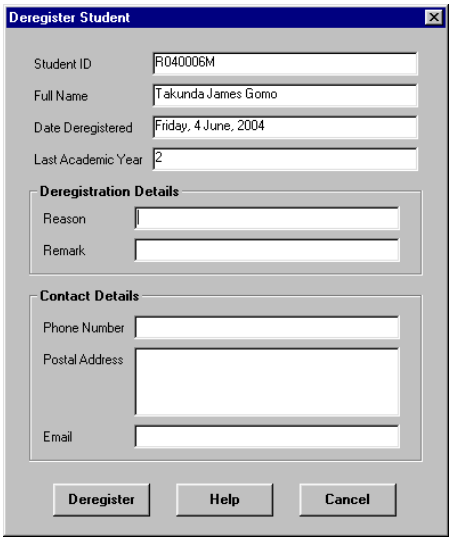
When entering details on the form please note that

a. You cannot change the Student ID and the date on which the record was last updated.
b. The **Family** Tab gives you lists for entering the language, religion and parents' marital status of the student. You are however still able to type in a value if it does not exist in the list.
c. For the **Doctor, Medical Aid, House**, **Class, Guardian**, **Mother** and **Father** tabs, you must select the value to record by choosing the **Select** button shown below

d. The **Relatives** tab enables you to add and remove the students' relatives at the school. The **Add** button will start a wizard that will help you locate the relative's details from the infoQuest system. Once added, you can use the **Edit** button to edit the relationship and the **Remove** button to remove the relationship.

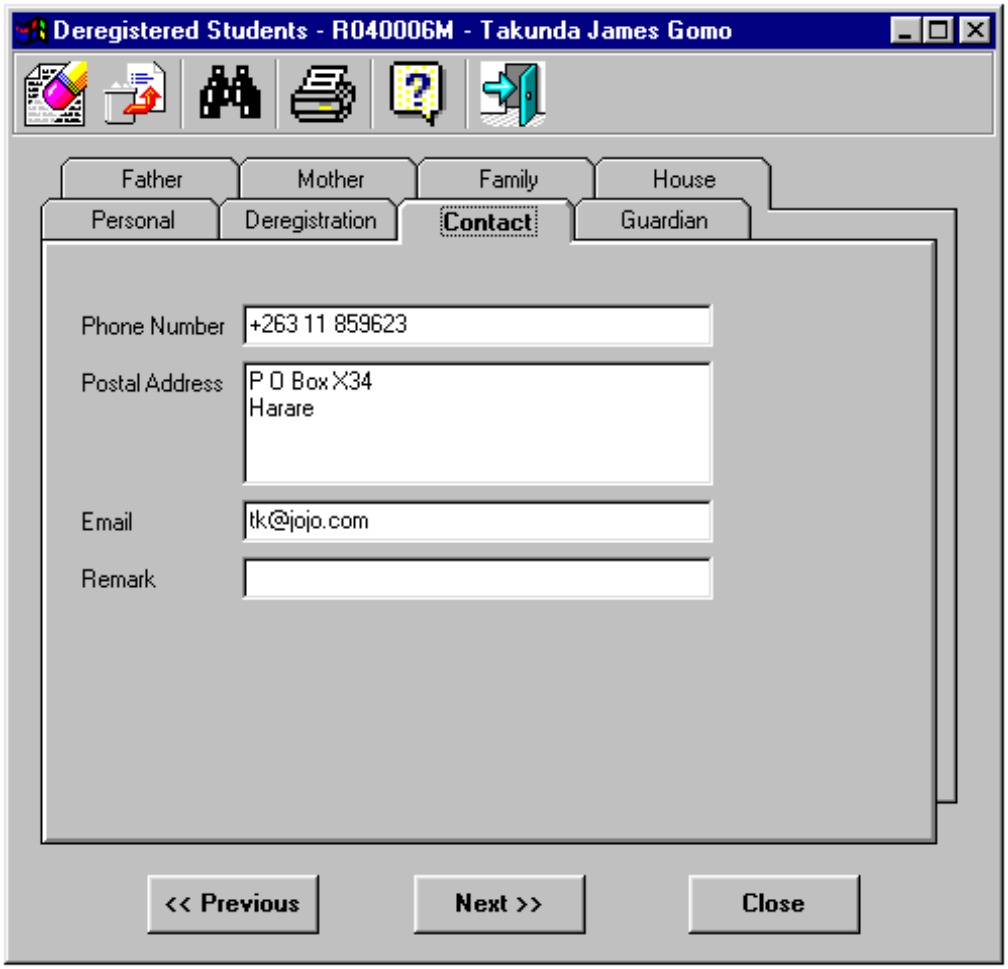


e. To deregister a student, choose the **Deregister** icon. You will then be presented with the following window which you should fill. After filling in the required details, choose the **Deregister** button.

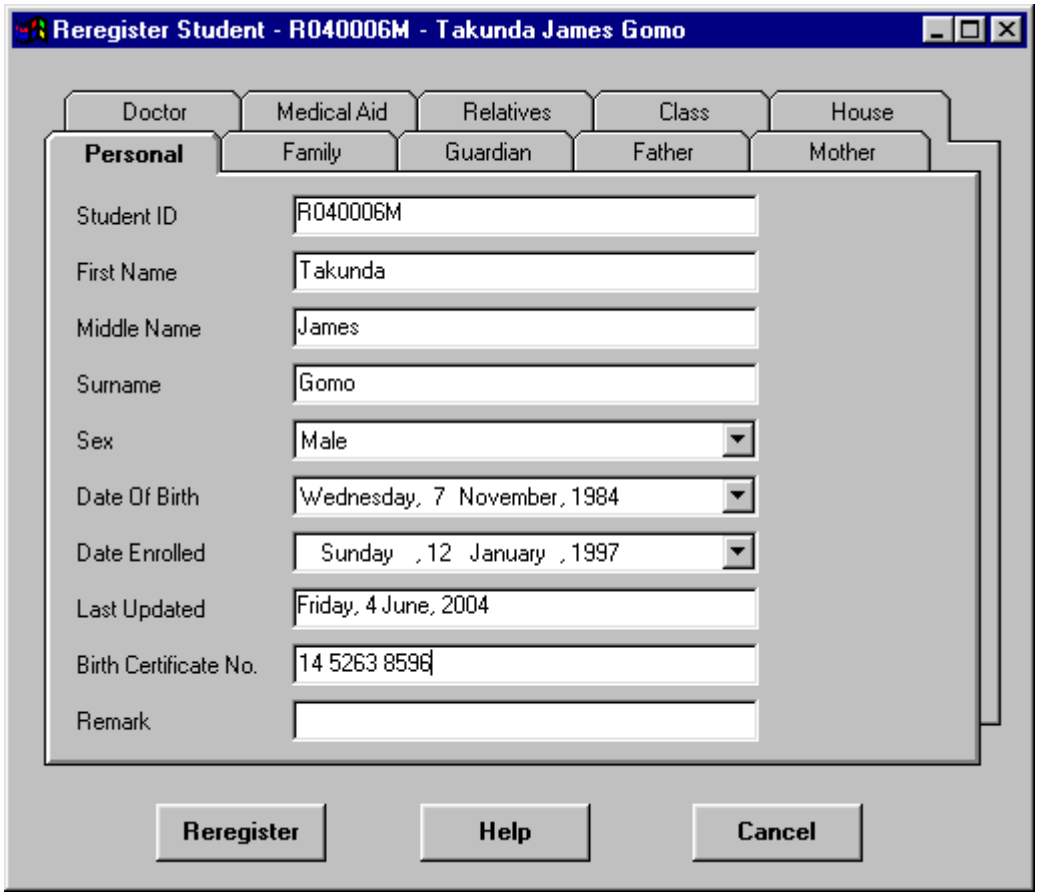


Deregistered Students

The deregistered students facility archives the details of deregistered students. A screen shot of the window is shown below.

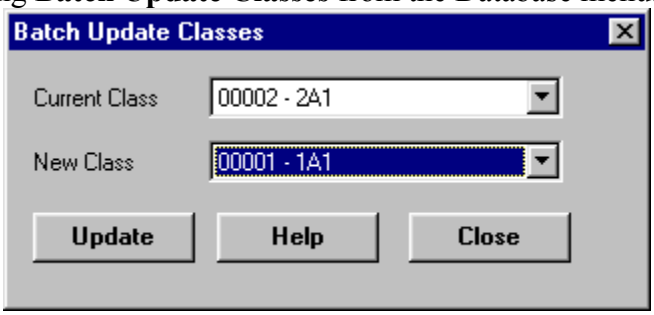


With the exception of the details recorded under the **Contact** tab, you cannot edit deregistered students' details. You can however reregister a student by selecting the **Reregister** icon and then filling out the form show below which is similar to the **Registered Students** form



Batch Updating Classes

At the end of the year, you may need to move all of the students in a given class to a new class. InfoQuest provides a facility for automating such a process. The facility can be accessed by choosing **Batch Update Classes** from the Database menu.

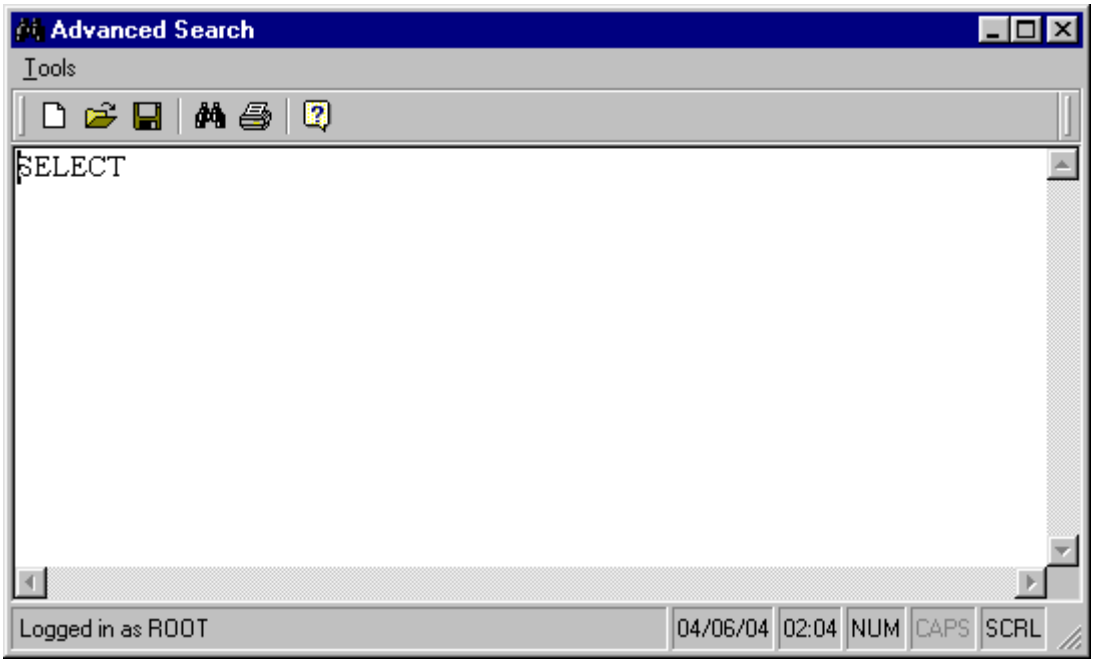


You may find the following strategy useful

a. Move all the Upper sixes and Form Fours into specials classes e.g. U6 Sc Leavers for all those who were in U6 Sc
b. Start with the Lower sixes and end with the Form ones.

Chapter 5: Finding Information

The Advanced Search Utility, shown in the diagram below, allows you to execute queries on the database for as long as those queries do not seek to modify data. This utility will allow you to find any information you may want from the database provided you know the SQL required for the query. In addition to knowing the SQL, you will also need to know the database structure. For information on the database table structure, consult your database administrator.

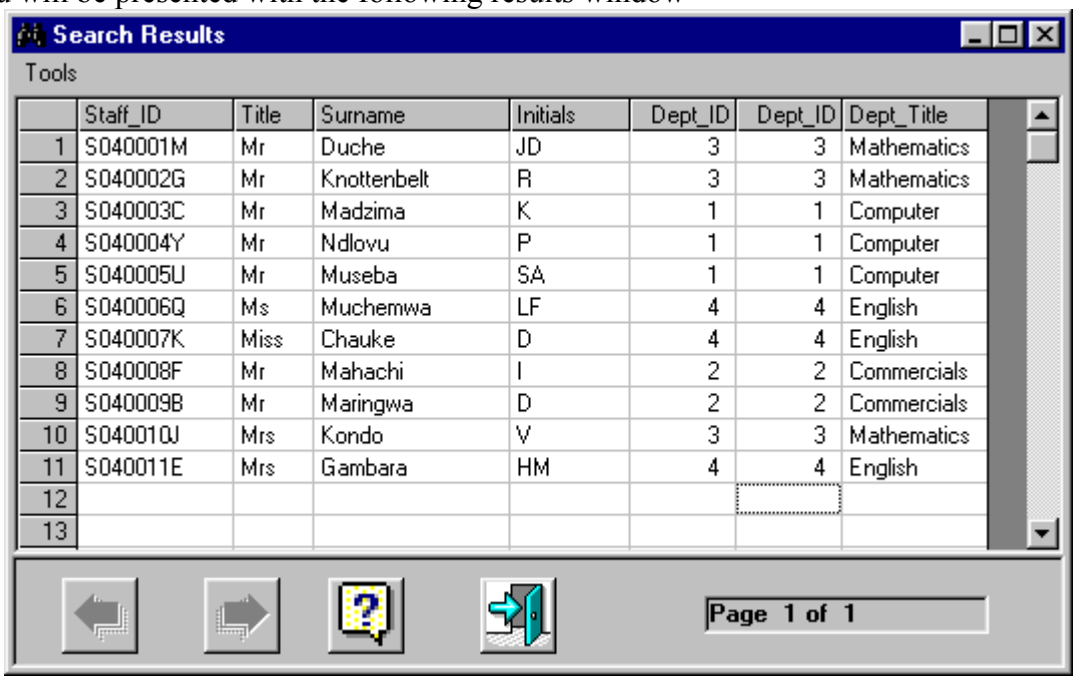


The main search window, pictured above, allows you to manage your SQL files by saving and opening them later. The following is a summary of what the functions provided under the **Tools** menu of the main window do.

Menu Item	Remarks
New Query	Erases the query window allowing you to start working on a new query.
Open SQL File	Opens a previously saved SQL file.
Save SQL File	Saves the currently displayed SQL file under its current filename if it already has one.
Save SQL File As	Saves the displayed SQL file under a different filename.
Execute Query	Presents the search results for the displayed query.
Print SQL	Prints the displayed SQL file text.

Viewing Query Results

After entering your SQL or opening a predefined query, you can view the results it returns by choosing **Execute SQL** from the **Tools** menu. If the query finds any matches you will be presented with the following results window



	Staff_ID	Title	Surname	Initials	Dept_ID	Dept_ID	Dept_Title
1	S040001M	Mr	Duche	JD	3	3	Mathematics
2	S040002G	Mr	Knottenbelt	R	3	3	Mathematics
3	S040003C	Mr	Madzima	K	1	1	Computer
4	S040004Y	Mr	Ndlovu	P	1	1	Computer
5	S040005U	Mr	Museba	SA	1	1	Computer
6	S040006Q	Ms	Muchemwa	LF	4	4	English
7	S040007K	Miss	Chauke	D	4	4	English
8	S040008F	Mr	Mahachi	I	2	2	Commercials
9	S040009B	Mr	Maringwa	D	2	2	Commercials
10	S040010J	Mrs	Kondo	V	3	3	Mathematics
11	S040011E	Mrs	Gambara	HM	4	4	English
12							
13							

From the above show results window, you can do the following by choosing the appropriate function from the Tools menu.

- Adjust column widths so that they display the full details.
- Export the results to Microsoft® Excel
- Export the results to a generic format understood by all spread sheets
- Adjust the row height. For example you can instruct the system to display 4 lines of text for each record so that you can view the addresses clearly.

	Addresses do not export well to the generic format. You will probably get a better result if you export to the Excel Format and then try to import the results from the excel file into your spreadsheet program.

Using Pattern Matching In Your Searches

You use wildcard characters as placeholders for other characters when you are specifying a value you want to find and you:

- Know only part of the value.
- Want to find values that start with a specific letter or match a certain pattern.

In the Search and Advanced Search utility you can use the following characters to find such field value.

Character	Usage	Example
*	Matches any number of characters. It can be used as the first or last character in the character string.	wh* finds what, white, and why
?	Matches any single alphabetic character.	B?ll finds ball, bell, and bill
[ ]	Matches any single character within the brackets.	B[ae]ll finds ball and bell but not bill
!	Matches any character not in the brackets.	b[!ae]ll finds bill and bull but not bell
-	Matches any one of a range of characters. You must specify the range in ascending order (A to Z, not Z to A).	b[a-c]d finds bad, bbd, and bcd
#	Matches any single numeric character.	1#3 finds 103, 113, 123

Notes

- Wildcard characters are meant to be used with text data types, although you can sometimes use them successfully with other data types, such as dates, if you don't change the Regional Settings properties for these data types.

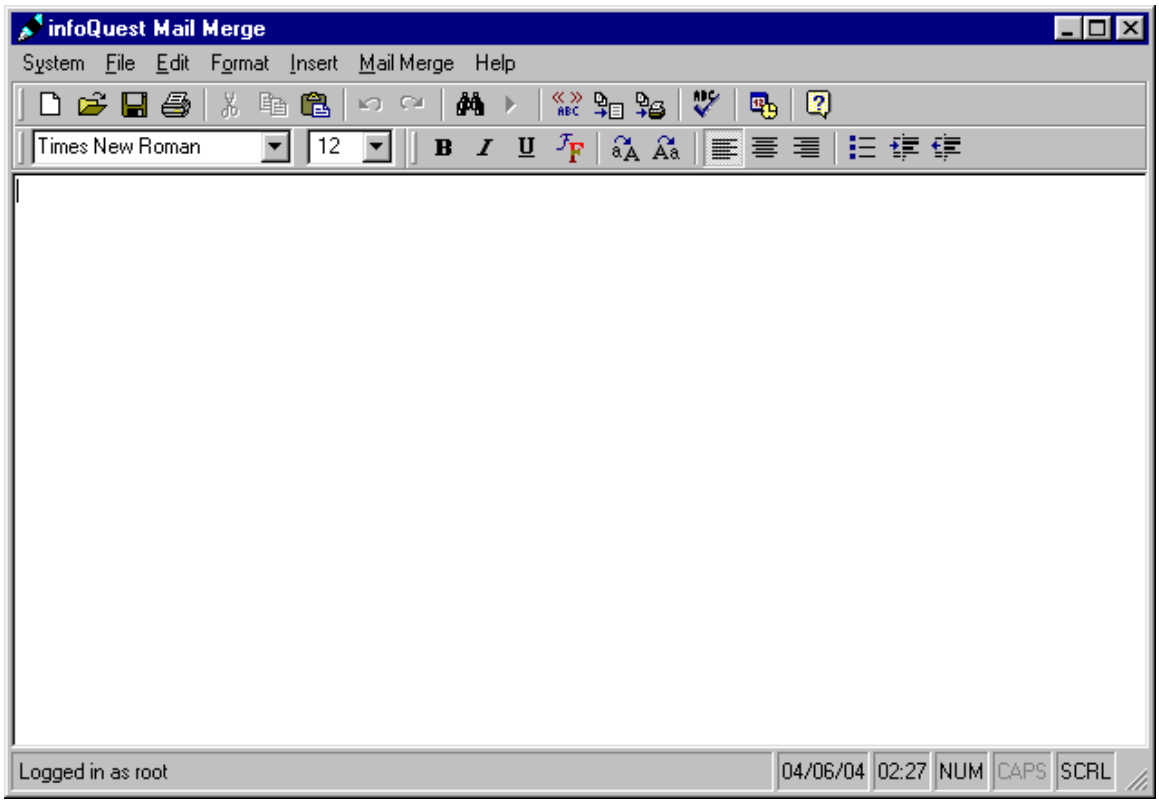
- When using wildcard characters to search for an asterisk (*), question mark (?), number sign (#), opening bracket ([), or hyphen (-), you must enclose the item you're searching for in brackets. For example, to search for a question mark, type **[?]**. If you're searching for a hyphen and other characters simultaneously, place the hyphen before or after all the other characters inside the brackets. (However, if you have an exclamation point (!) after the opening bracket, place the hyphen after the exclamation point.) If you're searching for an exclamation point (!) or closing bracket (]), you don't need to enclose it in brackets.

- You can't search for the opening and closing brackets ([ ]) together because the Microsoft® Jet query system interprets this combination as a zero-length string. You must enclose the opening and closing brackets in brackets ([[ ]]).

Chapter 6: Mail Merge

The Mail Merge facility allows you to write a standard letter from which the system can then generate personalised letters using a query that you specify. When you start Mail Merge, you will be prompted for a **Query Source File**. This is the file that the system uses to obtain the personalised details.

Before supplying a query file, it is often prudent for you to open it using the Advanced Search utility so that you can be assured that it returns the records that you want. Once you have specified the source query file, you will be presented with the following window.

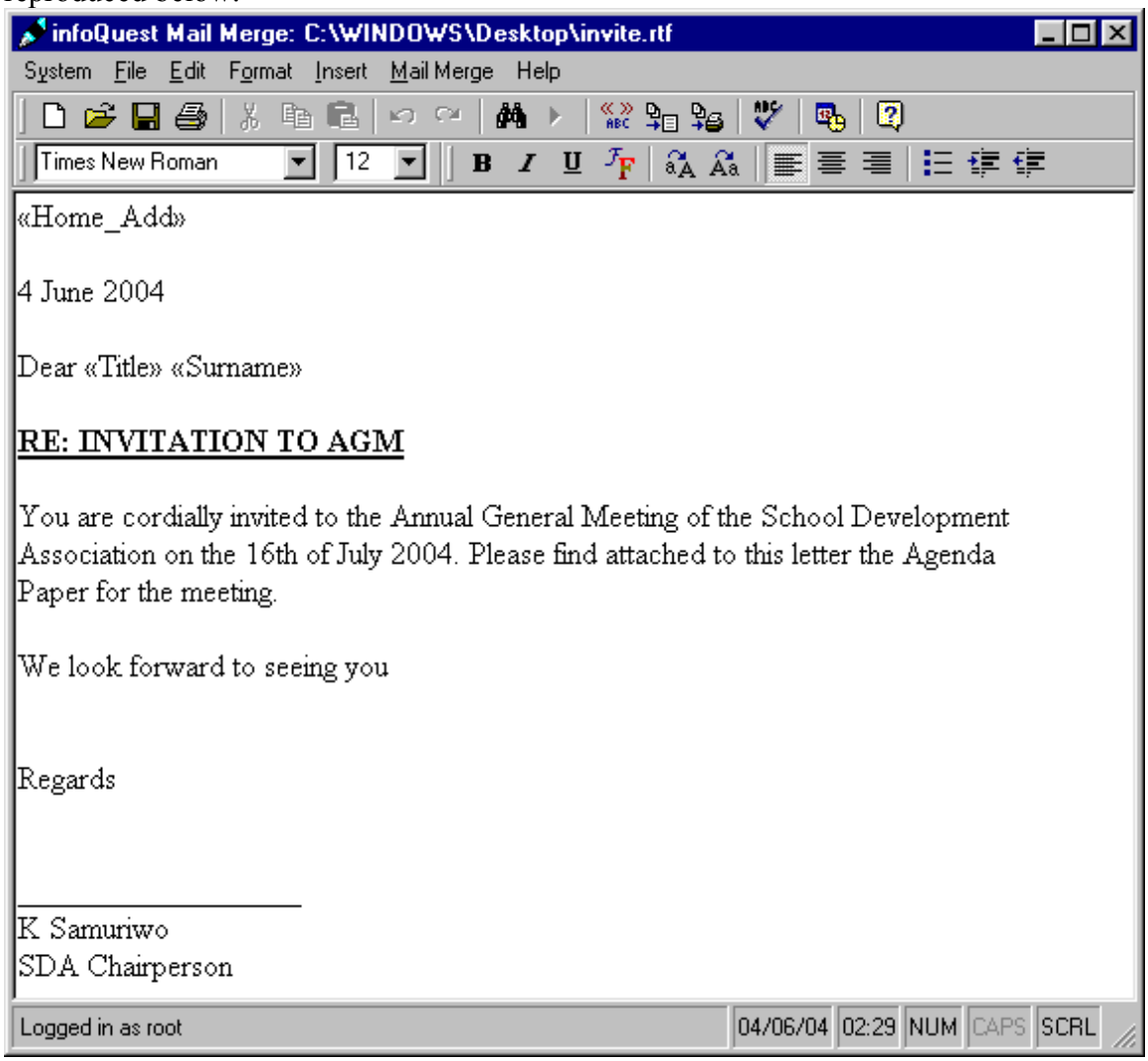


The above window is a typical document editor with added features for mail merge processing. You will find that you will be able to perform most of the functions you will need by selecting the toolbar buttons. To find out what a particular toolbar button does, place the mouse pointer over it for about 3 seconds and you will get a tool tip.

Text Editing Functions

After you have specified the source SQL file, you must then supply a document giving the standard letter. To do this, you can either type a new letter or open an existing one which you can modify, if you wish, before you run the mail merge. The editor supports several file handling and document formatting functions. To get a feel of what a standard

letter looks like, have a look at the sample provided in your **Letters** folder that is also reproduced below.


infoQuest Mail Merge: C:\WINDOWS\Desktop\invite.rtf
System File Edit Format Insert Mail Merge Help
Times New Roman
12
«Home_Add»
4 June 2004
Dear «Title» «Surname»
RE: INVITATION TO AGM
You are cordially invited to the Annual General Meeting of the School Development Association on the 16th of July 2004. Please find attached to this letter the Agenda Paper for the meeting.
We look forward to seeing you
Regards
K Samuriwo
SDA Chairperson
Logged in as root
04/06/04
02:29
NUM
CAPS
SCRL

Creating A New Document

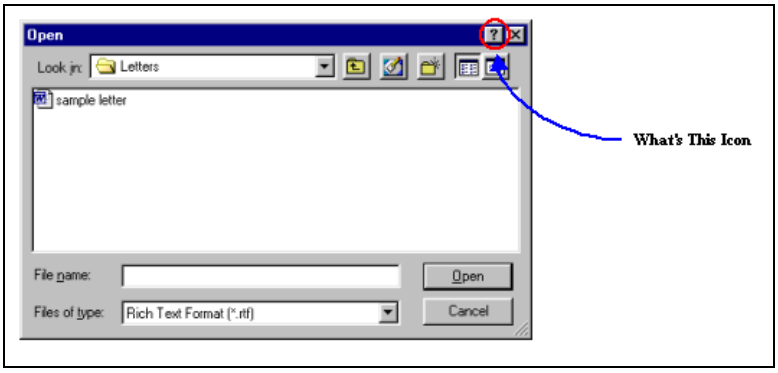
When you start the Mail Merge utility, it automatically loads a new document for you. If during your mail merge job you decide to create another document that will **use the same** SQL file, choose the '**New**' icon in the document toolbar.

To create a new document that will use a **different** SQL source file, use the **Start New Session** option outlined below instead.

Opening A File

1. Click the **Open** icon in the toolbar.
2. Locate the file in the window provided and double click it. If you come across anything in this window that you do not understand, you can get additional help by

clicking the **What's This** icon shown in the diagram below and then clicking the item you want to find more information about.



Saving A File

1. Click the **Save** icon.
2. If the file does not have a filename, you will be prompted to specify a filename. If you need more information on any of the items in the windows that will be displayed, click the "**What's This**" help button and then click the item you want additional information on.

Saving A File Under A Different Filename

If you wish to save the changes you will have made to the existing file but still want to keep the old version, you must save the displayed file under a different filename. To do this,

1. From the **File** menu, choose "**Save As**".
2. You will be prompted to specify a filename. If you need more information on any of the items in the windows that will be displayed, click the "**What's This**" help button and then click the item you want additional information on.

Printing the Standard Letter

1. Click the Print icon.
2. A standard Print window from which you should choose the Print button will then prompt you. If you need more information on any of the items in the windows that will be displayed, click the "**What's This**" help button and then click the item you want additional information on.

Searching For Words or Phrases

There will be times when you will want to locate a particular word or phrase from your standard letter. Steps for doing this are outlined below.

1. Choose the New Search icon

2. You will be resented with the following window.

3. In the **Find What** box, enter the text you want to locate.
4. Select the **Whole Word** option if you would like to find whole word only.
5. Select the **Match Case** option if you would like the matches to be only returned if they match the word you specified in terms of capitalisation.
6. Select **Find Next** to locate the first match.
7. To find additional matches either
    a. Choose the **Find Next** button.

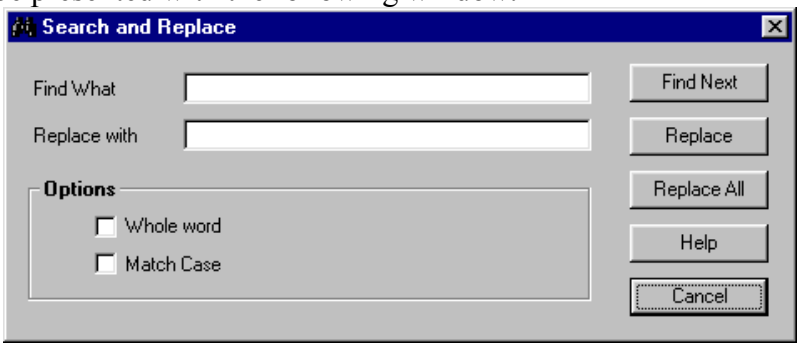
    Or

    b. Close the Find window by selecting **Cancel** and then press the click the **Find Next** icon

To start a new search, repeat the above steps. If the **Find** window is already open, simply type in the new word you want to look up and then choose the **Find Next** button.

Replacing Words or Phrases

1. Select **Search and Replace** from the **Edit** menu.
2. You will be presented with the following window.



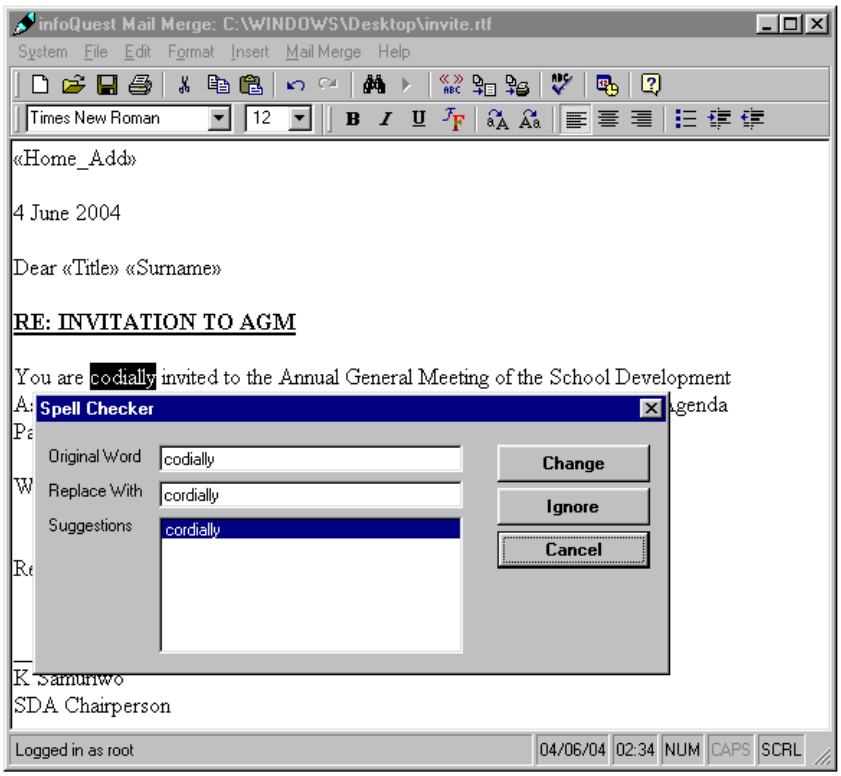
3. In the **Find What** box, enter the text you want to replace.
4. In the **Replace With** box, enter the text you would like to replace the text you will have specified above.
5. Select the **Whole Word** option if you would like to find whole word only.
6. Select the **Match Case** option if you would like the matches to be only returned if they match the word you specified in terms of capitalisation.
7. If you want to replace all the occurrences in just "one go" then select the **Replace All** button. To replace items one by one,
    a. Click the **Replace** button. If a match is currently selected, the system will replace that single occurrence. If there is no match selected, the system will

find the next match, select it and replace it the next time you click the **Replace** button

b. If you come across an occurrence that you would like to skip over without replacing, select **Find Next** when it is selected.
c. You can stop replacements at any time by choosing the **cancel** button.

Spell Checking Your Document

1. Select **Spell Check** from the Edit menu or select the Spell Check icon from the toolbar.



2. If a spelling error is discovered you have three options
    a. Replace the word with one of the suggestions.
        i. Select the suggestion from the list
        ii. Choose **Change**
    b. Replace the word with a word that you type in yourself.
        i. Type in the replacement word in the **Replace With** box
        ii. Choose Change
    c. Ignore the spelling error by choosing **Ignore**

Cutting, Copying and Pasting

The Levy system provided standard cut, copy and paste functions for text.

- To copy some text, select the text and then select the copy icon from the toolbar . The keyboard shortcut is **Ctrl⊕ C.**
- To cut some text, select the text and then select the cut icon from the toolbar . The keyboard shortcut is **Ctrl⊕ X.**

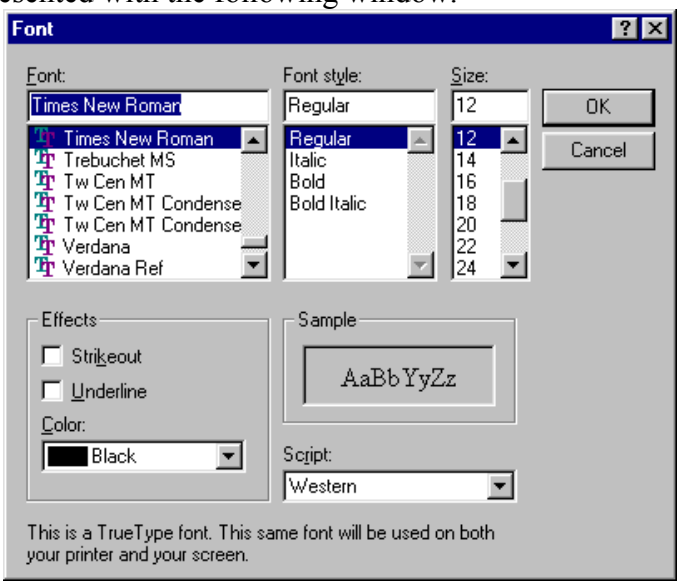
- To paste some text, place the cursor where you want the text to be inserted and then select the paste icon from the toolbar. The keyboard shortcut is **Ctrl⊕V.**

These functions **may** work with pictures but this is not guaranteed. To get reliable results with pictures, use the keyboard shortcuts instead.

Dealing with Fonts

The document formatting used in the mail merge facility supports several fonts, font sizes and text effects like colour and underlining. To use these formatting facilities,

1. Select the **Fonts** icon.
2. You will be presented with the following window.



3. Select the options you want. Note that the window your operating system presents to you may look a bit different.
4. Choose **OK**.

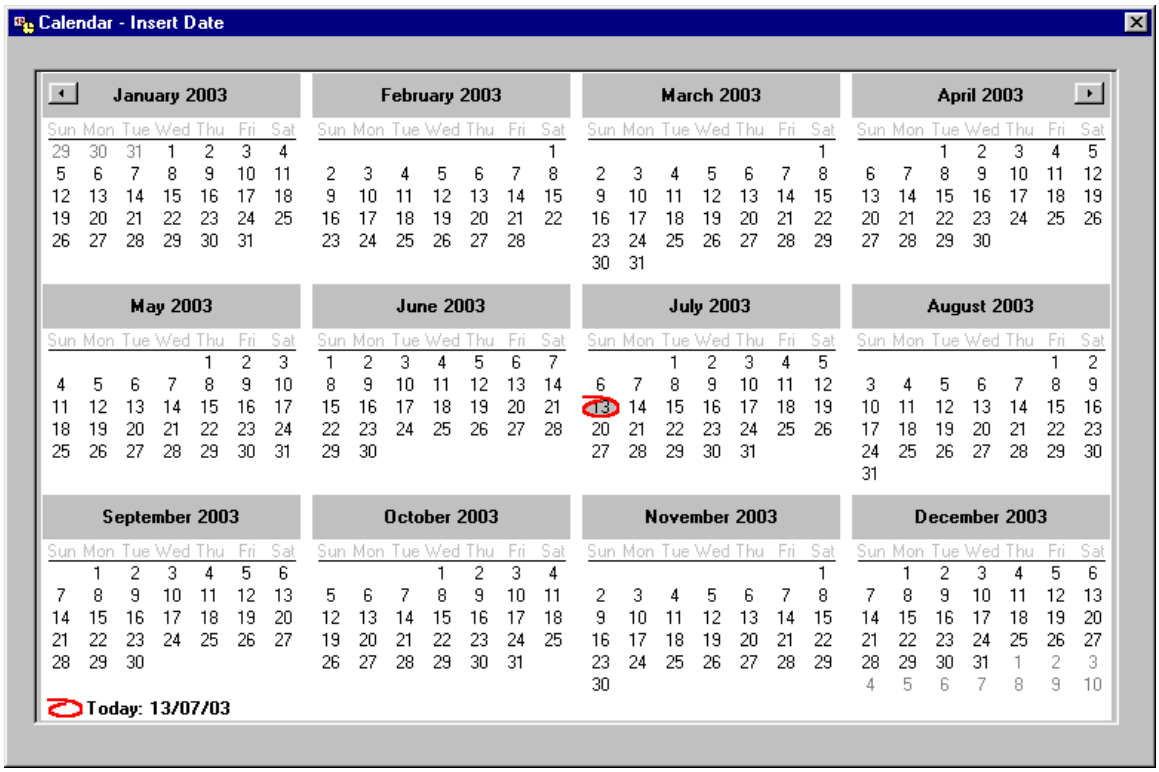
Alternatively, you can use the toolbar formatting functions. To find out what each does, place your mouse over its icon for about 3 seconds.

Changing Case

You can change any selection of text to all capitals or small letters. To convert a selection into all capitals, select the capitalise icon. For the reverse, use the "To Lower Case" option.

Inserting a Date Into Your Document

1. Place the cursor where you want the date to be inserted.
2. Select the **Insert Date** icon.
3. You will be presented with following window. Double click the date you wish to include. To insert a date not displayed in the calendar, use the buttons in the top left and right corners to browse to the calendar for the year you want.



Inserting A Picture Into Your Document

1. Place the cursor where you would like the picture to be inserted.
2. Select **Picture** from the **Insert** menu.
3. Select the picture file you would like to insert from the list of files provided.

Inserting Another Document File Into Your Current Document

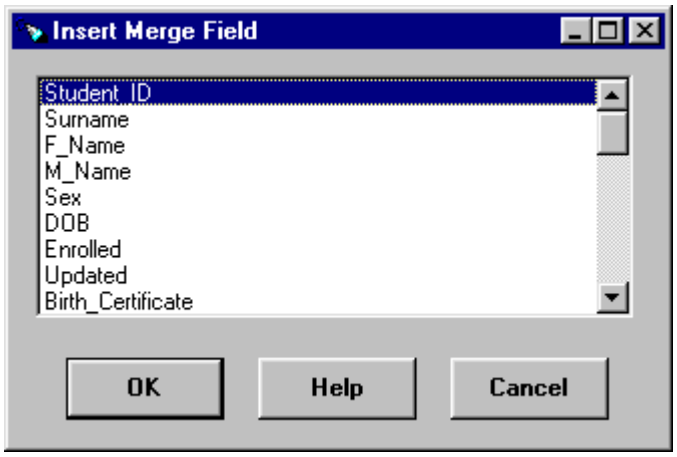
1. Place the cursor where you would like the picture to be inserted.
2. Select **File** from the **Insert** menu.
3. Select the file you would like to insert from the list of files provided.

Mail Merge Functions

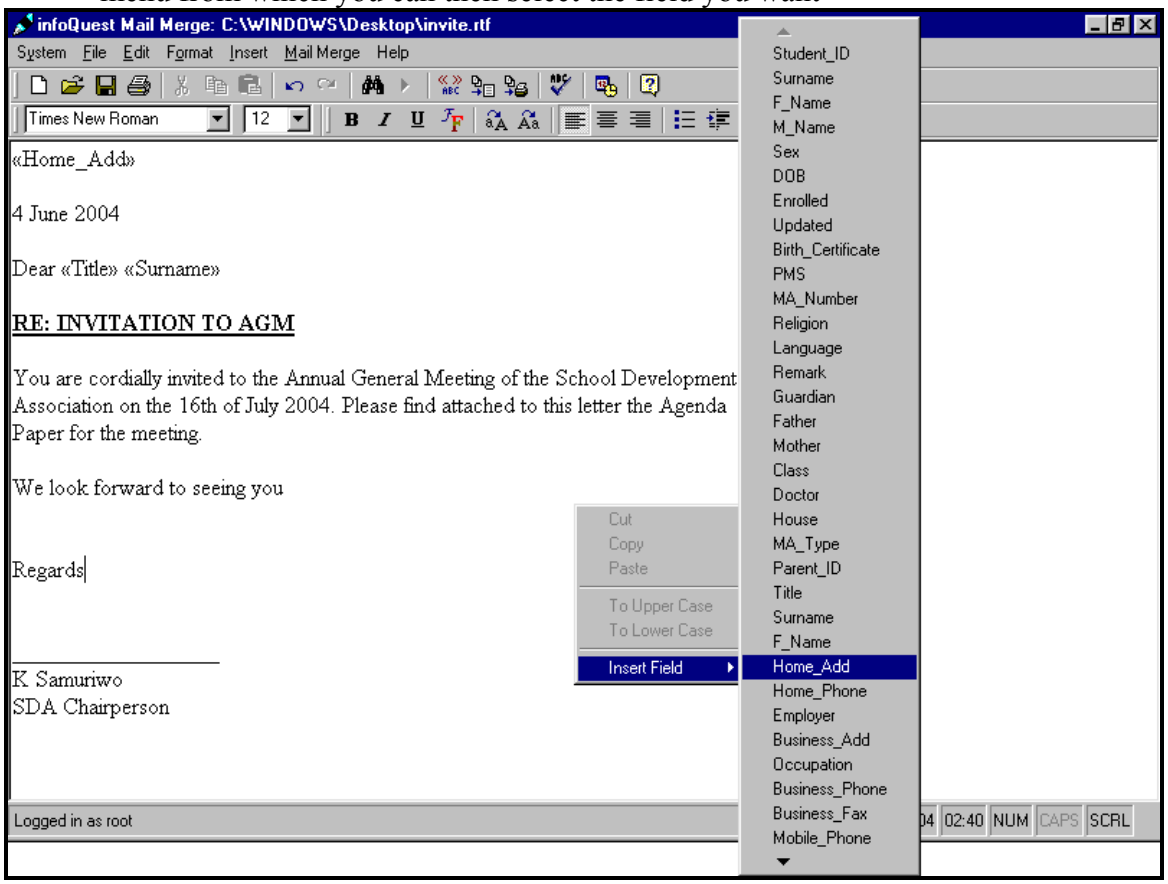
Merge Fields

A merge field is a label instructing the system to insert a personalised detail at the position in the document at which the merge field is. For example, in the sample letter show at the beginning of this chapter there is a merge field for the address represented by «Guardian Address». This label is in fact an instruction to the system to replace «Guardian Address» with the contents of the "Guardian Address" column in the result of the query specified in the source SQL file that you supply when you are starting a merge session. To insert a merge field,

1. Place the cursor where you would like the personalized detail to be inserted
2. Do one of the following
    a. Click the insert merge field icon and select the field you want from the list that will be provided from a window looking like the one shown below. You select by either double clicking the field in the list or clicking the field and then the **OK** button.



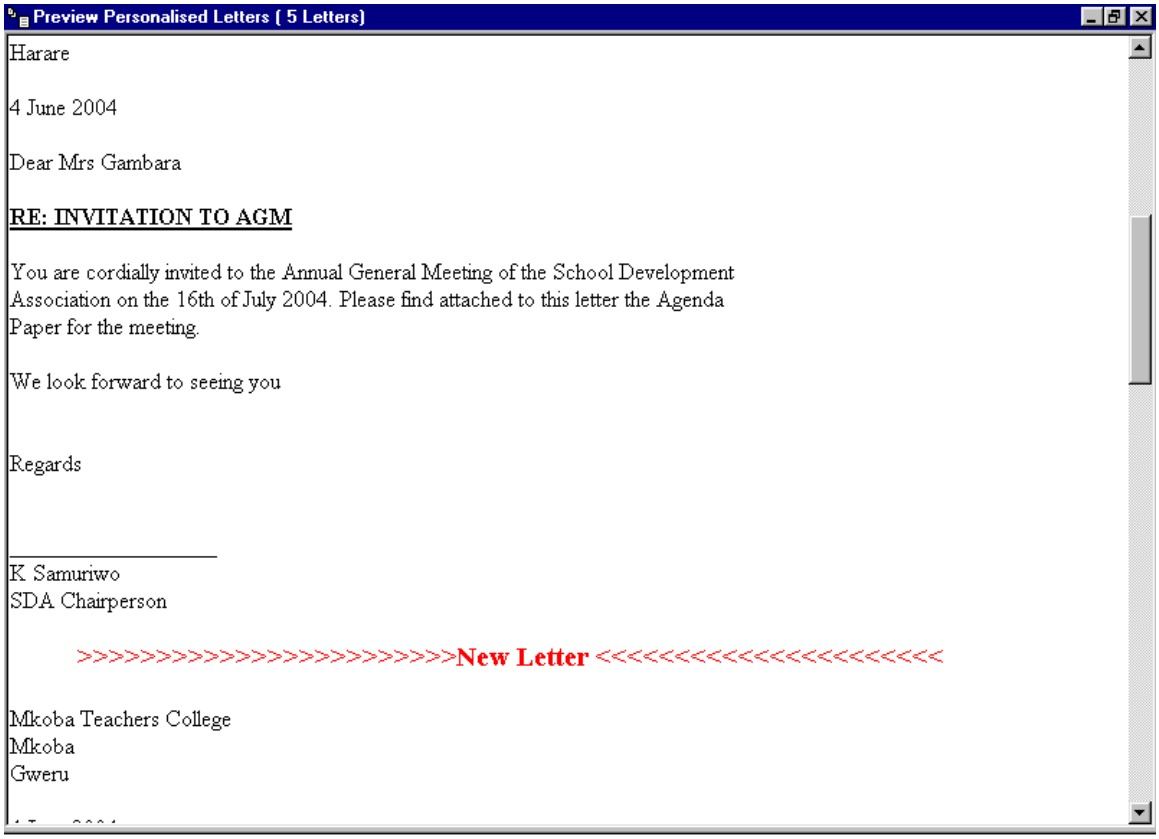
    b. Press the right button of your mouse. You will be presented with a pop up menu from which you can then select the field you want



    c. Select **Insert Field** from the **Mail Merge** menu and follow the steps outlined under the first option.

Previewing The Personalised Letters

Before printing the personalised letters, you may want to have a look at how they will appear. To do this, choose the Preview Mail Merge icon from the toolbar. This will display a window with a list of all the letters with the personalised details inserted. A sample of the window is shown below


Preview Personalised Letters (5 Letters)
Harare
4 June 2004
Dear Mrs Gambara
RE: INVITATION TO AGM
You are cordially invited to the Annual General Meeting of the School Development Association on the 16th of July 2004. Please find attached to this letter the Agenda Paper for the meeting.
We look forward to seeing you
Regards
K Samuriwo
SDA Chairperson
>>>>>>>>>>>>>>>>>>>>>>>>>>New Letter <<<<<<<<<<<<<<<<<<<<<<<<
Mkoba Teachers College
Mkoba
Gweru

Producing Personalised Letters

To produce your personalised letters, simply choose the **Produce Personalised Letters** icon. You will be shown a progress bar as the letters are produced. If the source query is complex, the system might take a little while before displaying the progress bar. Please be patient.

Viewing The Query Source

If for some reason you want to see what the source query you just specified contain, choose **View Query Source** from the **Mail Merge** option. This maybe particularly useful when the system presents you with a list of field names that you did not expect.

Starting A New Session

A mail merge session is based on a single SQL file. If at any point you decide that you want to use a different SQL file, you must start a new Session. To do this, choose "**New Session**" from the Mail Merge menu.

Appendix: GNU GENERAL PUBLIC LICENSE

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- Version 2, June 1991
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